MINUTES ALABAMA REAL ESTATE APPRAISERS BOARD RSA UNION STREET SUITE 370 MONTGOMERY, AL 36104 March 13, 2025

MEMBERS PRESENT:

Mr. Chad Anderson (Chairman)

Mrs. Melanie Housh (Vice-Chairman)

Mr. Timothy Mills

Mr. Roger Ball

Mr. Randall Kyles

Mr. Mark Palmer

Mr. Bill Mackey

Mr. Drew Watson

MEMBERS ABSENT:

Mr. A.J. Smith

STAFF PRESENT:

Mrs. Lisa Brooks, Executive Director Ms. Neva Conway, Legal Counsel Mrs. Margaret Anne Davis, Legal Assistant Mr. Jimmy Green, Investigator

GUESTS PRESENT:

None

- Mr. Chad Anderson, Chairman, called the meeting to order at 9:04 a.m. Mrs. Margaret Anne Davis, ASA II, Investigative/Legal Support, recorded the minutes. The meeting was held in Suite 300 Conference Room of the RSA Union Building, 100 N. Union Street, Montgomery, Alabama. Prior notice of the meeting was posted on the Secretary of State's website on December 31, 2024, in accordance with the Alabama Open Meetings Act.
- 2.0 The meeting was opened with prayer by Mrs. Housh and the Pledge of Allegiance led by Mr. Anderson.
- 3.0 Mr. Anderson asked for a voice roll to establish a quorum. Board members present were Mr. Chad Anderson, Mr. Roger Ball, Mr. Bill Mackey, Mr. Randall Kyles, Mr. Tim Mills, Mrs. Melanie Housh, Mr. Drew Watson, and Mr. Mark Palmer. Mr. A. J. Smith was not in attendance. A quorum was established.
- 4.0 On motion by Mr. Mills and second by Mr. Ball the regular minutes for January 9, 2025 were approved as written. Motion carried by unanimous vote.

- 5.0 Ms. Conway informed the Board that the disciplinary case against James Lester is continued until May 8th. Mr. Kyles and Mrs. Housh will need to recuse, and Mr. Ball will not be in attendance.
- Ms. Conway presented proposed amendments to the Administrative Code 780-X-3 Applications for Licensure and Certification; 780-X-5 Curricula Approved by The Board; 780-X-12 Expirations, Renewals and Continuing Education; and 780-X-18 Appraisal Management Company Forms. On motion by Mr. Anderson and Mr. Mills, the Board voted to approve the proposed amendments

Ms. Conway presented the following amendments for final adoption: 780-X-6-.03 — Qualifying Experience — Licensed; 780-X-6-.04— Qualifying Experience — Certified Residential; 780-X-6-.05 — Qualifying Experience — Certified General; 780-X-6-.06 — Qualifying Experience Given for Review Appraisals; and 780-X-9-.01 — Classification of Real Estate Appraisers.

On motion by Mr. Mills and second by Mr. Kyles, the Board voted to adopt the PAREA rules. Motion carried by unanimous vote.

- 7.0 On motion by Mrs. Housh and second by Mr. Mills, the following applications were voted on as listed. Motion carried.
- 7.1 <u>Trainee Real Property Appraiser</u> applications approved: Jackson Chase Penn, Taylor Redmond, and Sean Risner. Applications deferred: None. Applications denied: None.
- 7.2 <u>State Registered Real Property Appraiser</u> applications approved: None. Applications deferred: None. Applications denied: None.
- 7.3 <u>Licensed Real Property Appraiser</u> applications approved: Stephanie Johnston. Applications deferred: None. Applications denied: None.
- 7.4 <u>Certified Residential Real Property Appraiser</u> applications approved: Lucas Eric Smith (Recip)(GA). **Applications deferred:** None. **Applications denied:** None.
- Certified General Real Property Appraiser application approved: Justin Hunter Arnold (Recip)(TX), Jessica Bryson (Recip)(SC), William Clayton Collins, Bruce Daubner (Recip)(FL), Daniel Enslen (Recip)(FL), Mark Evans (Recip)(TN), Anna Field, Lee Wendell Folsom (Recip)(GA), Ann Marie Holcombe (Recip)(FL), Michael Hotaling (Recip)(FL), Joel St. John (Recip)(TX), Walker Boone Kelly (Recip)(TX), Brent Matthews (Recip)(FL), Michael Conboy O'Brien (Recip)(TX), Brett Testa (Recip)(GA), Peyton Mattiews (Recip)(MS), and McKenna Luke (Recip)(AZ). Applications deferred: None. Applications denied: None.
- 7.6 <u>Mentor</u> applications approved: None. Application deferred: None. Applications denied: None.

<u>Trainee Real Property Appraiser Experience Logs for Review:</u> <u>Logs reviewed:</u> Hayden Pharr. <u>Log Reviews deferred:</u> Marion Brian Long, and Stone McCurry.

8.0 Mrs. Brooks presented the Finance report for February 2024-2025, reported that the Board was 42% into Fiscal Year 2025 and 33% into budget expenditures and that there were no negative trends that could not be reconciled at this time.

Mr. Watson discussed potential changes in the number of residential appraisers due to the new Fannie Mae requirements. Mr. Anderson suggested issuing a statement to appraisers through the newsletter and website.

On motion by Mr. Mills and second by Mr. Kyles, the Board voted to approve the Finance Report. Motion carried by unanimous vote.

9.0 On motion by Mr. Anderson and second by Mr. Mackey, the following education courses and instructor recommendations on the March Education agenda were approved, deferred, or denied as indicated. Motion carried by unanimous vote.

CHAMPIONS SCHOOL OF REAL ESTATE

New Applications:

- (CE) Ownership Variations and Valuations 7 Hours Classroom (Instructors: Will Harris, Jasmine Quinerly, Kevin Muhammad, Nancy Zaccaria, Gynell Vestal, and Mack Mitchell)

 Both Course and Instructor Approved
- (CE) Residential Valuation: Site Valuation and Cost Approach 14 Hours

 Classroom
 (Instructors: Will Harris, Jasmine Quinerly, Kevin Muhammad, Nancy Zaccaria, Gynell Vestal, and Mack Mitchell)

 Both Course and Instructor Approved
- (LIC) Residential Valuation: Advanced Applications and Case Studies –
 15 Hours Classroom
 (Instructors: Will Harris, Jasmine Quinerly, Kevin Muhammad, Nancy Zaccaria, Gynell Vestal, and Mack Mitchell)

 Both Course and Instructor Approved
- (CE) Market Analysis and Highest and Best Use 14 Hours Classroom (Instructors: Will Harris, Jasmine Quinerly, Kevin Muhammad, Nancy Zaccaria, Gynell Vestal, and Mack Mitchell)

 Both Course and Instructor Approved
- (CE) Residential Valuation: Report Writing and Case Studies 14 Hours Classroom (Instructors: Will Harris, Jasmine Quinerly, Kevin Muhammad, Nancy Zaccaria, Gynell Vestal, and Mack Mitchell)

 Both Course and Instructor Approved

- (LIC) Statistical Analysis and Real Estate Finance 15 Hours Classroom (Instructors: Will Harris, Jasmine Quinerly, Kevin Muhammad, Nancy Zaccaria, Gynell Vestal, and Mack Mitchell)

 Both Course and Instructor Approved
- (CE) 2024-2025 7-Hour National USPAP Update 7 Hours Classroom (Instructors: Will Harris, Jasmine Quinerly)

 Both Course and Instructor Approved

INTERNATIONAL RIGHT OF WAY ASSOCIATION

New Application:

(CE) 410-Reviewing Appraisals in Eminent Domain – 8 Hours - Classroom
 (Instructor: Eric Murray)
 Both Course and Instructor Approved

MCKISSOCK LP New Applications:

- (CE) The Appraiser's Guide to the New URAR 7 Hours Classroom (Instructors: Alan Hummel, Alexander Gilbert, Charles Fisher, Charles Huntoon, Dan Bone, Dan Bradley, Dan Tosh, Greg Stephens, Howard Kanter, John Dingeman, Josh Walitt, Julie Floyd, Kevin Hecht, Mel Black, Pamela Teel, Robert Frazier, Robert Luciani, Steve Maher, Tony Pistilli and Wally Czekalski)

 Both Course and Instructors Approved
- (CE) Small Spaces, Big Impact-Appraising ADUs 3 Hours Online (Instructor: Jo Traut)

 Both Course and Instructor Approved
- (CE) Live Webinar: The Appraiser's Guide to the New URAR 7 Hours-Online
 (Instructors: Alan Hummel, Alexander Gilbert, Charles Fisher, Charles Huntoon, Dan Bradley, Diana Jacob, Greg Stephens, Jo Traut, John Dingeman, Josh Walitt, Julie Floyd, Kevin Hecht, Mel Black, Pamela Teel, Rob Abelson, Robert Frazier, Rob McClelland, Sam Martin and Steve Maher)

 Both Course and Instructors Approved

(CE) Cracking the Code-Demystifying Desktop and Hybrid Appraisals - 3 Hours - Classroom

(Instructors: Alan Hummel, Alexander Gilbert, Charles Fisher, Charles Huntoon, Dan Bone, Dan Bradley, Dan Tosh, Greg Stephens, Howard Kanter, Josh Walitt, Julie Floyd, Kevin Hecht, Mel Black, Pamela Teel, Robert Frazier, Robert Luciani, Steve Maher, Tony Pistilli and Wally Czekalski)

Both Course and Instructors Approved

(CE) Live Webinar: Cracking the Code-Demystifying Desktop and Hybrid Appraisals - 3 Hours-Online

(Instructors: Alan Hummel, Alexander Gilbert, Charles Fisher, Charles Huntoon, Dan Bradley, Diana Jacob, Greg Stephens, Jo Traut, Josh Walitt, Julie Floyd, Kevin Hecht, Mel Black, Pamela Teel, Philicia Lloyd, Rob Abelson, Robert Frazier, Robert McClelland, and Steve Maher)

Both Course and Instructors Approved

MELISSA BOND

New Applications:

(CE) Valuation Bias & Fair Housing Laws and Regulations - 7 Hours - Classroom

(Instructor: Melissa Bond)

Both Course and Instructor Approved

(CE) 2024-2025 7-Hour National USPAP Update Course - 7 Hours -

Classroom

(Instructor: Pam Teel)
Instructor Approved

THE CE SHOP LLC

New Applications:

(CE) Appraisal Statistics - 3 Hours - Online

(Instructor: Rebecca Jones)

Both Course and Instructor Approved

(CE) Appraisal Technology and GSE Appraisal Review – 4 Hours -

Online

(Instructor: Rebecca Jones)

Instructor Approved

CHAMPIONS SCHOOL OF REAL ESTATE, LTD

New Instructor Applications:

(CE) Appraising for the Supervisor and Trainee – 4 Hours - Classroom (Instructor: Gynell Vestal)

Instructor Approved

- (CE) Appraising for the Supervisor and Trainees 4 Hours Classroom (Instructor: Mack Mitchell)
 Instructor Approved
- (CE) Appraising for the Supervisor and Trainee 4 Hours Classroom (Instructor: Will Harris) Instructor Approved
- (CE) Appraising for the Supervisor and Trainees 4 Hours Classroom (Instructor: Jasmine Quinerly)
 Instructor Approved
- (CE) Appraising for the Supervisor and Trainee 4 Hours Classroom (Instructor: Kevin Muhammad)
 Instructor Approved
- (CE) Appraising for the Supervisor and Trainees 4 Hours Classroom (Instructor: Nancy Zaccaria)
 Instructor Approved
- 10.0 **Letters of Warning** were issued on the following investigations for the discrepancies indicated. This disciplinary action will be considered in any future discipline proceedings:

<u>AB 24-05</u>: There is no support in the workfile for adjustments to the comparable sales. Although it is mentioned as a prior transaction, there is no discussion or analysis of the previous sale. It should be noted that the property was listed for \$550,000 and sold after 16 days on market for \$600,000. Violation: Standard 1-5(a), Record Keeping Rule, USPAP, 2020-2021 Ed.

Mr. Anderson and Ms. Conway discussed Letters of Counsel being listed on the disciplinary history for Probable Causes.

The Board discussed the Disciplinary Committee meeting in person on the Wednesday before the May Board meeting.

Ms. Conway discussed with the Board the investigative status charts. Ms. Conway reported that 4 new Appraiser complaints and no new Appraisal Management Company (AMC) complaints were received since the January 2025 Board meeting, 6 complaints were dismissed, and 1 complaint was settled, leaving a total of 25 open complaints.

11.0 The Board reviewed Probable Cause Report **AB-24-09**: On motion by Mr. Kyles and second by Mr. Ball, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report AB-24-17: With Mr. Anderson recusing, on motion by Mr. Ball and second by Mrs. Housh, the Board voted that probable cause does not exist and to issue a Conditional Dismissal. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report AB-24-18: With Mr. Anderson recusing, on motion by Mr. Mills and second by Mr. Ball, the Board voted that probable cause does not exist and to issue a Conditional Dismissal. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report AB-24-19 companion case to AB-25-02: With Mr. Anderson recusing, on motion by Mr. Mills and second by Mr. Ball, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report AB-25-02 companion case to AB-24-19: With Mr. Anderson recusing, on motion by Mr. Mills and second by Mr. Ball, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report AB-24-33: With Mr. Anderson and Mr. Ball recusing, on motion by Mr. Mills and second by Mr. Palmer, the Board voted that probable cause does not exist and to dismiss this case. Motion carried by unanimous vote.

The Board deferred Probable Cause Report **AB-24-36** to the May Board meeting.

The Board reviewed Probable Cause Report AB-24-39: On motion by Mr. Mills and second by Mr. Palmer, the Board voted that probable cause does not exist and to issue a Conditional Dismissal. Motion carried by unanimous vote.

- 12.0 There were no Consent Settlement Orders to review at this time.
- The following reciprocal license was issued since the January Board meeting: Justin Hunter Arnold (G)(TX), Jessica Bryson (G)(SC), Bruce Daubner (G)(FL), Daniel Enslen (G)(FL), Mark Evans (G)(TN), Lee Wendell Folsom (G)(GA), Ann Marie Holcombe (G)(FL), Michael Bowman Hotaling (G)(FL), Joel St. John (G)(TX), Walker Boone Kelly (G)(TX), Brent Edward Matthews (G)(FL), Michael Conboy O'Brien (G)TX), Lucas Eric Smith (R)(GA), Brett Testa (G)(GA), Peyton Mathiews (G)MS) and McKenna Luke (G)(AZ).
- 14.0 The Temporary Permit report was provided to the Board for their information.
- 15.0 The Appraisal Management report was provided to the Board for their information.
- Mrs. Brooks discussed hiring a clerk. On motion by Mr. Mills and second by Mr. Mackey, the Board voted to approve hiring a clerk.

The Board discussed the Investigator position. May Board meeting contract Investigator.

17.0 Ms. Conway discussed the Review Appraiser position and will contact Purchasing regarding how this position will be paid.

Ms. Conway will request sample reviews from all three candidates for the Review Appraiser position.

Mrs. Brooks included a USPAP checklist for Board information.

Ms. Conway discussed the Executive Director position and job specifications with the Board.

At 11:57 a.m., with Mrs. Housh recusing, on motion by Mr. Ball and second by Mr. Mills, the Board voted to enter Executive Session to deliberate on the Recommendation of the Administrative Law Judge on AB-23-56, Cleabron E. Pullum. Motion carried by unanimous vote. Board members in favor of the motion were Mr. Ball, Mr. Kyles, Mr. Palmer, Mr. Mills, Mr. Mackey, Mr. Watson and Mr. Anderson.

At 12:38 p.m., with Mrs. Housh recusing, on motion by Mr. Ball and second by Mr. Kyles, the Board voted to end the Executive Session. Motion carried by unanimous vote. Board members in favor of the motion were Mr. Ball, Mr. Kyles, Mr. Palmer, Mr. Mills, Mr. Mackey, Mr. Watson and Mr. Anderson.

With Mrs. Housh recusing, on motion by Mr. Mills and second by Mr. Palmer, the Board voted to adopt the Findings of Fact recommended by the Administrative Law Judge in AB-23-56 (Cleabron Pullum). Motion carried by unanimous vote. Board members in favor of the motion were Mr. Ball, Mr. Kyles, Mr. Palmer, Mr. Mills, Mr. Mackey, Mr. Watson and Mr. Anderson.

With Mrs. Housh recusing, on motion by Mr. Mills and second by Mr. Kyles, the Board voted to adopt the Administrative Law Judge's Conclusions of Law recommended by the Administrative Law Judge in AB-23-56 (Cleabron Pullum). Motion carried by unanimous vote. Board members in favor of the motion were Mr. Ball, Mr. Kyles, Mr. Palmer, Mr. Mills, Mr. Mackey, Mr. Watson and Mr. Anderson.

With Mrs. Housh recusing, on motion by Mr. Mills and second by Mr. Kyles, the Board voted to reject the discipline recommendation of the Administrative Law Judge in AB-23-56. Motion carried by unanimous vote. Board members in favor of the motion were Mr. Ball, Mr. Kyles, Mr. Palmer, Mr. Mills, Mr. Mackey, Mr. Watson and Mr. Anderson.

With Mrs. Housh recusing, on motion by Mr. Mills and second by Mr. Mackey, the Board voted to revoke the license of Mr. Cleabron Pullum (R00216). Motion carried by unanimous vote. Board members in favor of the motion were Mr. Ball, Mr. Kyles, Mr. Palmer, Mr. Mills, Mr. Mackey, Mr. Watson and Mr. Anderson.

19.0

At 12:40 p.m., on motion by Mr. Mills and second by Mr. Kyles, the Board voted to adjourn the regular Board meeting. Motion carried by unanimous vote.

The Board's tentative meeting schedule for 2025 is May 8, 2025, July 10, 2025, September 11, 2025, and November 13, 2025, held in the RSA Union 3rd Floor Conference Room, 100 Union Street, Montgomery, AL 36104.

Sincerely,

Carolyn Greene Executive Secretary

/cg

APPROVED:

Chad Anderson, Chairman