

I SURVIVED REAL ESTATE

2019

SEPTEMBER 27, 2019

Hosted By



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Orange County and
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2019**

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Orange County and
the Inland Empire

Grayson wished to visit the
ocean and collect seashells.
One week. Just sunshine,
sea-turtles, smiles and sand.

One wish come true.
One family brought
closer together.

Lives changed forever.

Grayson, 4
hypoplastic left heart syndrome
I wish to go to Sanibel Island
and look for seashells

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Void where prohibited by law. ST. Jude's audited financial statement is available upon request to ST. Jude by calling 1-800-822-6344 or by email
at annual.report@stjude.org. Your payment may be deducted under Federal and State income tax laws only to the extent that it exceeds the cost
of the tickets you purchase. Void where prohibited by law. CA R-0061

EVENT OUTLINE

4:00pm-5:30pm: Registration, pictures

4:30pm: 5:45pm: Appetizers in the Grand Hallway

5:45pm: Dinner seating

5:45pm-7:00pm: Dinner is served

7:00pm: Event begins

8:30pm: Dessert & coffee

9:00pm: Panel discussion

10:00pm End

GIVE

The Norris Group pays for I Survived Real Estate so 100% of what we raise via sponsorships and tickets goes directly to Make-A-Wish and St. Jude's Children Research Hospital. If you'd like to help us raise funds, please donate via our giving page at:

bit.ly/isre2019tng



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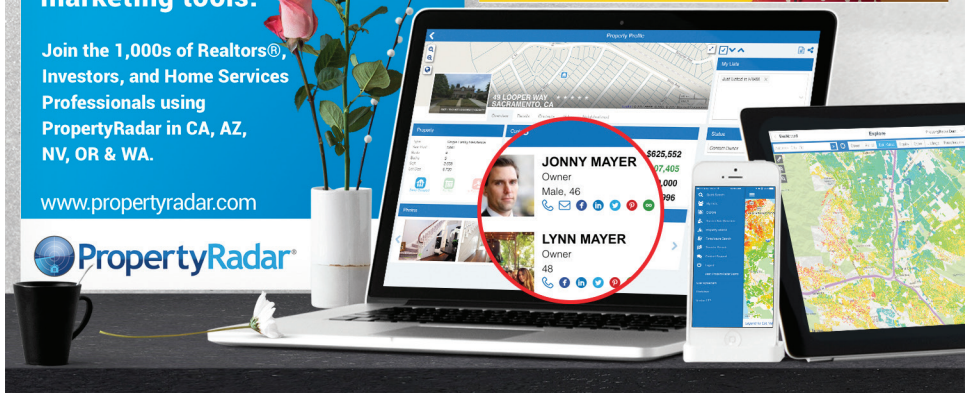
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THE MENU

**Please alert your waiter of allergies
upon seating.**

Dinner created by

Master Chef Maurice Brazier

*Personal Chef to a King and a President and Decorated with Medal of
National Merit by French President for his worldwide culinary work*

Appetizers

*Bacon-wrapped dates; ahi tartare won ton; beef wellington;
flatbread with tomatoes & mozzarella*

First Course

Salade

*Cucumber ring salad, goat cheese, roasted pear, cherry tomatoes, with
dijon mustard vinaigrette*

Entrée

*Pan seared chicken and jumbo shrimps, garlic, capers, white wine,
parsley, lemon and Roma tomatoes. All entrees served with sun-dried
tomatoes mashed potatoes and vegetables. Alternative Vegetarian
Entrée preparation available upon request*

Dessert

Chocolate hazelnut cake, crème anglaise

**Wine graciously donated by
Rick and LeeAnne Rossiter**

PANEL OF EXPERTS



Jim Park
CEO & Co-Founder
The Mortgage
Collaborative



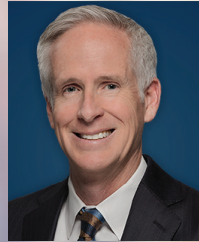
Simon Chen
EVP Innovation
Realty



Bruce Norris
President
The Norris Group



Doug Duncan
Chief Economist
Fannie Mae



John Burns
CEO
John Burns Real Estate
Consulting



Sean O'Toole
Founder & CEO
PropertyRadar



Mark Lesswing
SVP
T3 Sixty

On social media? Follow along via:

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Jim Park – Jim provides day-to-day oversight of The Mortgage Collaborative (TMC) business initiatives and works closely with TMC's Board of Directors to ensure that the company achieves its annual and long-term goals. With nearly 30 years in the housing and mortgage banking field, Park has held various positions in the corporate sector, started several businesses, worked in federal and local governments, and helped to launch a number of prominent nonprofit organizations. Over the years, Park has served on various corporate, government and nonprofit boards, including chairing the last Federal Reserve's Consumer Advisory Board along with past Federal Reserve Chair Ben Bernanke.
@MtgCoop

Simon Chen – Simon Chen has recently been appointed head of New Product and Innovation for Realogy, the parent company to brands like Coldwell Banker, ERA, NRT, and Better Homes and Gardens Real Estate. Simon previously served as President and CEO of ERA Franchise Systems. Chen is a licensed broker in California and a member of the Beverly Hills and Santa Clara real estate boards. He mentors with the National Association of REALTORS® Second Century Ventures' REach® program and Moderne Ventures, two real estate technology incubators. Prior to joining ERA, Chen was the COO at Realty One Group.
@realogy

Bruce Norris – Bruce Norris is a real estate investor, hard money lender in California and Florida, and real estate educator with over 35 years experience

and over 2,000 real estate transactions. Bruce is best known for his long-term real estate market predictions including his report, *The California Comeback* in 1997 and the *California Crash* in 2006. Bruce hosts an award-winning radio show on 590am which has been in production for over a decade. In his free time practices martial arts.
@thenorrisgroup

Doug Duncan – Douglas G. Duncan is Fannie Mae's Vice President and Chief Economist. He is responsible for managing Fannie Mae's Strategy Division and Economics & Mortgage Market Analysis Groups. Prior to joining Fannie Mae, Duncan was Senior Vice President and Chief Economist at the Mortgage Bankers Association. He was named one of the country's top four most accurate economists in 2010 by the *Wall Street Journal* and named one of *Bloomberg / BusinessWeek's* 50 Most Powerful People in Real Estate. Duncan is a frequent speaker on national and state economic, housing, and mortgage market conditions.
@fanniemae

John Burns – John founded John Burns Real Estate Consulting in 2001 to help executives make informed investment decisions. The company's research subscribers receive the most accurate analysis possible to inform their macro investment decisions, and the company's consulting clients receive specific property and portfolio investment advice designed to maximize profits. John co-authored *Big Shifts Ahead: Demographic Clarity for Businesses*, a book written to help make

demographic trends easier to understand, quantify, and anticipate. 600,000+ people follow John's LinkedIn Influencer column, 30,000+ subscribe to his emails, and the media cited the firm 250+ times in 2017.

Before founding John Burns Real Estate Consulting in 2001, John worked at a national consulting firm for 4 years and for 10 years at KPMG Peat Marwick—2 as a CPA and 8 in their Real Estate Consulting practice. **@jbrec**

Sean O'Toole – Sean O'Toole is CEO & Founder of PropertyRadar, the property data and owner information platform real estate pros have trusted since 2007 to do billions of dollars in deals.

Sean start in technology in Silicon Valley. After the dot-com bubble, Sean flipped properties for five years, and got out right before the housing bubble burst.

Sean launched ForeclosureRadar in early 2007 before anyone had heard of the foreclosure crisis. IN 2013, he relaunched ForeclosureRadar as PropertyRadar, expanding the service to include

comprehensive data on all properties and property owners and making it easy for small businesses to discover new deals and customers. **@propertyradar**

Mark Lesswing – Mark Lesswing is Senior Vice President at T3 Sixty, a management consultancy firm in the residential real estate brokerage industry with a specialty in technology. Lesswing has acted in a senior technology role for over 30 years, and has been involved in hundreds of industry projects and technology initiatives. Mark Lesswing is a Blockchain Entrepreneur who holds a Bachelor of Science degree in Industrial Engineering from Lehigh University. He is the former Chief Technology Officer of the National Association of REALTORS® and a tenacious advocate for data standards and innovation. Mark is a frequent speaker at major trade conferences and is still active in the open source software community. Currently, he resides in Chicago with his wife, Susannah, and their three children. **@t3_sixty**



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Location:
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SDCIA supports education, investing and business opportunities related to locating, buying, financing, rehabbing, developing, renting, managing, selling and/or exchanging real estate as well as financial growth and preservation of wealth.



realty411 Magazine

Realty411 Magazine is a print and online resource developed to assist investors in the acquisition, management, and growth of their real estate portfolios.

UPCOMING REAL ESTATE EXPOS:

Manhattan, NY - Oct. 14th

Portland, OR - Oct. 21st

Ft. Lauderdale, FL - Nov. 4th

Atlanta, GA - Nov. 11th

Pleasanton, CA - Nov. 18th

Santa Barbara, CA - Dec. 2nd

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and Your Better is Best"*
David Granzella



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1 Year
TERM

9.9% RATE

UP TO **90%** LTC

Up to 100% rehab. 70% ARV max. Interest-only payments.
No prepayment penalty. Extensions available.
Inspections for repair releases. **Discounts for experience!**

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1 Year
TERM

8.9% RATE

80% Purchase

Up to 100% rehab. 70% ARV max. Interest-only payments.
No prepayment penalty. Extensions available.
Inspections for repair releases. **Discounts for experience!**

Refinance Rental



3 Year
TERM

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UP TO **65%** LTV

Rent ready properties. Interest-only payments.
CA is one-year prepayment penalty.
FL is five-year term with two-year prepayment penalty @ 60% max

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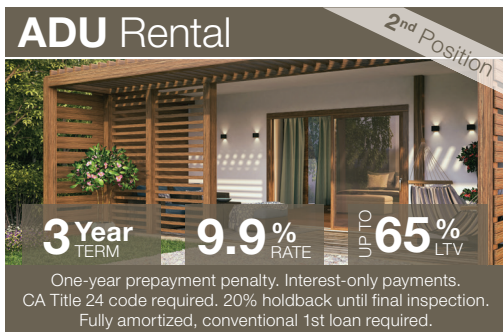
1 Year
TERM

10.9% RATE

UP TO **65%** FUTURE

No prepayment penalty. Interest-only payments.
Releases handled by third-party funds control.
CA is up to 65% after Florida 60% of after-build value.

ADU Rental



3 Year
TERM

9.9% RATE

UP TO **65%** LTV

One-year prepayment penalty. Interest-only payments.
CA Title 24 code required. 20% holdback until final inspection.
Fully amortized, conventional 1st loan required.



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Cutting-Edge Financial Tactics Breakfast



9th Annual Tax and Investment Strategies
Brunch for 2019/20 and Beyond on October 19th

A market researcher, CPA, and attorney walk into a bar...

For some, it sounds like the start of a silly joke. For those with questions on entities, retirement investing, estate planning, 1031s, opportunity zones or entrepreneurs trying to figure out how to structure deals, it's a dream come true!

Our 9th Annual *Cutting-Edge Financial Tactics* Breakfast is Saturday, October 19 in Costa Mesa, CA.

Six experts will tackle the most frequently asked questions of 2019 and any major updates you need to know. Then, we'll take a deep dive into audience questions and more advanced topics. Topics will include:

- Mistakes with out-of-state entities and risk
- New rules affecting self-directed IRA investments in 2019
- Advanced 1031 exchange structures and strategies
- Recession-proofing your real estate portfolio
- Trump tax law changes mean for real estate investors as individuals and entities
- And much more (of course)

Please see last year's event on Amazon Prime. We will not have time to cover basic topics! These pros will make time for more questions this year. Great food, awesome networking, and incredible



Bruce Norris
President
The Norris Group



Amanda Han & Matt MacFarland
Managing Directors
Keystone CPA



Kaaren Hall
President
uDirect IRA



Dino Champagne
Vice President
Asset Preservation, Inc.



Harry Barth
Managing Partner
BarthCalderon Attorneys



When

Sat., October 19th
8:00am Registration
8:30am-1pm event

Where

Center Club Orange County
650 Town Center Drive, Garden Level
Costa Mesa, CA 92626

Register at www.thenorrisgroup.com

or call 951-780-5856

Price

\$49 | **\$75**
single | for two

TURMOIL

The Coming Storm of Negative Interest Rates



When

Sat., February 1st
8:00am Registration
8:30am-5pm event

Where

Riverside Connection Center
3637 5th St
Riverside, CA 92501

Registration coming soon to at www.thenorrisgroup.com

save the date...

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