



Maine Real Estate &
Development Association

Supporting Responsible Development

MEREDA's Signature Event

January 26, 2023

MEREDA's 2023 Annual Real Estate Forecast Conference & Member Showcase



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MEREDA's Signature Event

2023 Annual Real Estate Forecast Conference

Thursday, January 26, 2023

9:00 - 10:00 AM - Member Showcase & **Continuing Education Credit Sign-In**

10:00 Seminar Introductory Remarks: Craig Young, President, MEREDA Board

10:15 Keynote Address: Greg Payne, Governor's Office of Policy Innovation and the Future

ECONOMIC OVERVIEW:

10:30 Economic Overview: James Marple, Managing Director, Senior Economist, TD Bank Group

SECTOR ANALYSIS:

11:00 Southern Maine Industrial Forecast: Justin Lamontagne & Sam LeGeyt, The Dunham Group

11:25 Bangor-Area Market Forecast: David Hughes, Epstein Commercial Real Estate

11:45 Recognition Awards Ceremony

12:00 Member Showcase

MEREDA HIGHLIGHTS:

1:00 Overview of MEREDA's Legislative Agenda: Elizabeth Frazier, Pierce Atwood, LLP

SECTOR ANALYSIS:

1:25 Southern Maine Residential Forecast:

Multi-Family: Brit Vitalius, Vitalius Real Estate Group

Single-Family: Dava Davin, Portside Real Estate Group

2:05 Central Maine Market Forecast: Frank Carr, Maine Realty Advisors

2:25 Midcoast Maine Market Forecast: Dave Holman, RE Max Riverside Commercial

2:45 * 10 Minute Break*

SECTOR ANALYSIS:

2:55 Maine's Vacation / Hospitality Forecast: Matt Arrants, The Arrants Company

3:15 Southern Maine Retail Forecast: Peter Harrington, Malone Commercial Brokers

3:35 Southern Maine Office Forecast: Nate Stevens, The Boulos Company

4:00 Conclusion of Event | Showcase Re-Opens | Social Hour & Raffles | **Continuing Education Credit Sign-Out**



CONTINUING EDUCATION CREDITS

This course has been approved for **4 hours** by the **Maine Real Estate Commission** for In-Person Continuing Education Credits for Real Estate Licensees and Appraisers.

**** ATTENTION **** In-Person real estate licensees and appraisers seeking credits will be **required to sign-in** upon arrival (by 10:00 am), **and also sign-out** at the end of the program (at 4:00 pm).

You **MUST** sign the **pink sign-in / sign-out sheets** located next to the registration area. **Failure to sign both in and out sheets will result in the forfeiture of credits.**

We must have proof of 2 signatures. **No exceptions.**

This course has been approved by the **Maine Board of Overseers** for **1 hour of legal continuing education credits**. Those seeking credits for attorneys must also sign in.

This course has been approved by **AIA Maine** for **4 hours** of architect credits. Those seeking credits for architects must also sign in.

Certificates of Completion will be Mailed to You.

CONTINUING EDUCATION CREDITS

SPEAKER BIOGRAPHIES

2023 Real Estate Forecast Conference Speakers

In order of appearance:

Craig Young joined The Boulos Company in 1987 and is a Partner and Senior Broker of the firm. He takes the time to intimately understand his clients' internal goals and processes to be their best advocate. His supportive approach successfully guides clients through even the most complex real estate deals. His consultative and supportive approach to real estate transactions has won him several corporate clients such as UNUM, La-Z-Boy Furniture, AR Building Company, CEVA, Securitas, Tradecraft, and Goodwill Industries of Northern New England to name a few. Craig has done numerous transactions for each of these companies, and a host of other individuals and investors.

Craig is the proud father of three children and an Australian cattle dog, named Missy. An avid traveler, recent and notable trips include Norway, Spain, Greece, Costa Rica, Columbia, and a cross-country road trip to California with his oldest daughter. He's addicted to McDonald's ice coffee (milk, no sugar), and he loves his Peloton and skiing.

Professional Affiliations/Accreditations include Maine Real Estate Broker License, Maine Commercial Association of Realtors, Certified Commercial Investment Member (CCIM), Member of International Council of Shopping Centers (ICSC), MEREDA; President of the Board.

Craig graduated from the University of New Hampshire with a Bachelor of Science Degree in Economics.

Greg Payne, Senior Advisor, Housing Policy, is one Maine's most experienced leaders in issues relating to housing and homelessness. Prior to joining the Governor's Office of Policy Innovation and the Future (GOPIF), he served as director of the Maine Affordable Housing Coalition, a diverse association of 136 private and public sector organizations committed to ensuring that all Mainers are adequately and affordably housed. In addition, he was a development officer for more than 14 years with nonprofit Avesta Housing, managing all aspects of multifamily rental projects from concept to completion.

He is the former board chair of the National Low-Income Housing Coalition, and has worked for the Atlanta Task Force for the Homeless and the Massachusetts Coalition for the Homeless.

Greg earned a BA in Economics from the College of the Holy Cross in Worcester, Massachusetts and a JD from Northeastern University School of Law in Boston. Following his graduation from law school, he worked in Boston for five years as a real estate attorney specializing in affordable housing.

James Marple is an Associate Vice President and Senior Economist in the Economics department. In his current role, he oversees the economic scenario generation process for internal and regulatory stress testing exercises for the bank's operations in Canada and the U.S. The team provides economic analysis and forecasts to TD clients and stakeholders, delivering on a wide scope of research, covering the U.S.,

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Canadian, and global economies.

James received his graduate degree in Economics from the University of Toronto in 2005. In October of this year, he celebrated his fifteen-year anniversary with TD Bank Group.

Justin Lamontagne is recognized as one of the leading experts on industrial real estate in Maine. With over a decade of experience, he has successfully brokered transactions in all sectors, specializing in industrial, office, and investment properties. From strategic planning and representation for both buyers and sellers, to site searches and commercial property valuations, his exceptional market knowledge and expertise is an asset for clients looking for not only results, but a lasting relationship. Carrying his Rotarian principles forward in every deal, Justin is always looking out for his clients' best interest and often talks people out of deals rather than into them. As such, he has fostered a reputation for being a genuine and trustworthy partner for clients.

As someone who approaches the market with a broad lens to understand all the different angles, positions, and perspectives, Justin is someone both clients and colleagues look to for his market insight. In 2013, Justin was named the Maine Commercial Association Realtor of the Year. In 2015 he earned the prestigious CCIM accreditation, an international membership comprised of the world's top commercial real estate professionals. In 2017 he earned the Society of Industrial & Office Realtor's (SIOR) designation, a global network of only 3,600 industry leaders. In doing so, he became the 5th broker in the state of Maine to carry both CCIM & SIOR honors. Annually, Justin is the author of The Dunham Group's Greater Portland Industrial Market Survey, a comprehensive study and inventory of the local industrial market.

Justin is active in several Greater Portland philanthropic and professional organizations. He currently serves on the Board of Directors of the Maine Commercial Association of Realtors (Past President), Maine Cancer Foundation, Town & Country Federal Credit Union, and Portland Little League. Justin is also an active member of the Rotary Club of Portland, the Maine Real Estate Development Association, the Portland Chamber of Commerce, and the CCIM & SIOR New England chapters.

Justin joined The Dunham Group in 2011. In 2016 he earned Partnership in the firm and, in 2019, was named Designated Broker. He has worked in commercial real estate since 2006 and has a degree from the University of Rochester (BA '02) and an advanced degree from Boston University (MS '04). In his free time, Justin is an avid water skier, snow skier, hiker, rock climber and plays organized softball. He lives in Portland with his wife, Marycelina, their children Katherine and William and their dog, Fenway. His wife is a 5-year breast cancer survivor, an experience that has contributed to Justin's empathy for others, commitment to having a true work/life balance, and his focus on giving back.

Sam LeGeyt Committed to helping Maine businesses thrive, Sam has earned a reputation for being hardworking, smart, and trustworthy. He specializes in the industrial, office, and investment markets and provides strategic planning, site searches, and representation for buyers, tenants, sellers, and landlords, as

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well as commercial property valuation and consulting services. Known for his insightful market analysis, Sam's valuation reports and consulting are relied upon by several local banks. A team player, Sam joined The Dunham Group in 2018 for the mentorship opportunities, and enjoys learning from and collaborating with other brokers to serve his and the firm's clients' best interest.

Active in several Greater Portland nonprofit organizations, Sam currently serves on the Board of Directors of Habitat for Humanity of Greater Portland and their Land Development Committee. Sam is also currently serving as a Director on The Maine Commercial Association of Realtors Board of Directors and is an active member of MEREDA (Maine Real Estate and Development Association).

Sam has worked in commercial real estate since 2014 and has successfully brokered transactions in all sectors of commercial real estate. A graduate of UNH's Peter T. Paul College of Business and Economics, Sam earned his degree in both Finance and Management, with a minor in Real Estate. Outside of the office, Sam enjoys being outdoors. He is an avid golfer and skier and can often be found at Sugarloaf or enjoying the outdoors with his wife, Meg, and chocolate lab, Willy.

David Hughes is a commercial broker with extensive experience in the industrial, office, land, investment, and retail sectors. Over the last 23 years with Epstein Commercial Real Estate, he has structured and closed hundreds of sale and leasing transactions from Portland to Millinocket with a focus on the greater Bangor area. Clients come to him for his market knowledge, strategic deal structures, and integrity.

David graduated from the University of Maine in Orono in business in 1993 and immediately entered the real estate industry when he joined his family business, Hughes Management, overseeing a property management portfolio of apartments and commercial properties. Today, while not actively involved in the day-to-day operations of Hughes Management, he remains engaged with financing, new acquisitions and long-range planning.

David is currently the Treasurer of the Maine Commercial Real Estate Association, a past board member of MEREDA, and is past President of the Bangor Rotary Club, where he was a recipient of the prestigious Paul Harris Fellow award.

David is the founder, past president, and current board member of the Carrabassett Region Chapter of the New England Mountain Bike Association (CR ENMBA) as well as a founding member of the town's Carrabassett Valley Trails Committee (CVTC). He has been heavily involved in developing a world class mountain bike destination in Carrabassett Valley. When not working, David enjoys mountain biking, skiing, whitewater rafting, camping and driving his tractor around his homestead in Bucksport.

Elizabeth Frazier focuses her practice on government relations, lobbying, business advocacy, and environmental and land use policy. Elizabeth divides her time between Pierce Atwood's Portland and Augusta, Maine offices.

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Elizabeth grew up in and around her family's Maine-based small business, working on all aspects of business growth and management. She has an intimate understanding of the realities and requirements of running a business in Maine. Elizabeth was engaged early with the work of the Maine Climate Council, and has worked with clients from diverse sectors of the economy to navigate this emerging policy arena, including: real estate and development; industrial and manufacturing processes; municipal land use; and energy infrastructure.

Elizabeth also engages with commercial real estate and development matters at both the local and state level. Specifically, Elizabeth has worked on land use referenda campaigns and ordinance proposals at the municipal level, statewide zoning policies, and public financing for development projects. Elizabeth has also been closely engaged with Maine policymakers as they increasingly focus on housing construction and affordability, and the interplay between that goal and other goals on the climate action, labor and wage, and racial justice and equity fronts.

In her personal life, Elizabeth is active in Maine Democratic politics. She recently finished a lengthy tenure as a member of the Emerge Maine Board of Directors, where she was active in helping train Democratic women to run for office and win. Elizabeth also serves on the board of Maine's Architecture, Construction and Engineering (ACE) Mentor Program. Elizabeth resides in the heart of Portland's Old Port.

Brit Vitalius, Vitalius Real Estate Group's founder and Designated Broker, has been representing buyers and sellers of multi-unit investments since 2004. He established VREG in January of 2011 to provide a full complement of residential, multi-family and commercial brokerage services to clients. The focus of the brokerage is on sales in Portland and Greater Portland.

Vitalius Real Estate Group produces two annual reports on the real estate market – the Southern Maine Multi-Family Report and the Portland Condo Report. Both are relied upon by industry experts for information and insights about the market in the Greater Portland area.

Brit is considered "the multi-family broker in Portland." According to MLS statistics, Brit had four times more multi-family sales than any other agent in Portland in 2017. In addition, Brit transacts numerous sales "off market" which are not accounted for in the MLS stats.

Brit is a yearly presenter at the Maine Real Estate and Development Association's Annual Forecast Conference for the multi-unit sector, and he is a leader and advocate in the landlord community. Brit is in his fourth term as President of the Southern Maine Landlord Association, a group which seeks to keep landlords up-to-date on important issues, trends and regulations. In the wake of the 2015 Noyes Street Fire, Brit became an active participant in multi-unit fire safety issues, and he was asked to serve on Portland's Fire Safety Task Force. He also owns and manages his own multi-unit investments in Portland and Yarmouth.

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In 2018, Brit was recognized for his work leading the campaign which defeated Portland's rent control referendum. He received awards from the Portland Regional Chamber of Commerce, MEREDA, and the Greater Portland Board of Realtors. This year, Brit was named the 2022 Realtor of the Year award by his Realtor peers in the Great Portland.

Dava Davin is the founder and CEO of Portside Real Estate Group, one of the top five real estate companies in Maine, and the only large real estate group in Maine to be woman owned and run. She started Portside in 2012, and in ten years, grew the business from five agents/staff to 150. Portside is one of the fastest growing real estate companies in northern New England with seven locations in Maine and New Hampshire and annual sales of over \$850,000,000.

Portside is also actively involved in the community, having raised over \$550,000 for local nonprofits through Portside Foundation 501(c)(3) by hosting events and 1% for Maine®. Portside is committed to giving 1% of gross revenue to Maine's future. Giving back is the underlying driver for the company, attracting agents and consumers that care and believe that a small ripple can cause a huge wave.

Dava has received numerous awards and accolades including 2018 MaineBiz "Women to Watch", 2020 Housingwire's "Women of Influence" winner, 2021 RISMedia Newsmaker winner, Named by both the Portland Phoenix and The Forecaster as Portland's Best Real Estate Company in 2018, Recognized nationally by Medium as one of the 100 Female Disruptors in 2018, National Speaker: Inman, RISMedia, HousingWire, Presenter MEREDA Annual Forecast Meeting (2018-2023). Davin lives in Cumberland Foreside, Maine along with her husband, Jim, and two teenage sons. She's an avid marathoner and four-time Ironman finisher.

Frank Carr's impressive resume of real estate experience includes overseeing the management of buildings in downtown and suburban Chicago, as well as developing and constructing million square foot buildings, various hotels, as well as apartment projects.

As an Owner's Representative, Frank coordinated all aspects of site acquisition, programming, and needs analyses with owners, business units and tenants ensuring smooth tenant fit out transitions to rentable leased up spaces. Frank's development experience includes commercial office buildings, hotels, and multifamily residential buildings. He leveraged his Chicago experience with Hines Interests building ABN AMRO, NA's (now Bank of America) marquee downtown office, data center, and check processing facility into multiple real estate development projects in New England.

Working with a local hotel development company, The Olympia Companies in New England, Frank worked with teams developing 50 Sewall St in Portland, Custom House Square Office Buildings in Portland, the Hampton Inns in North Conway and South Portland, the Hilton Garden Inn in Portsmouth, and the Holiday Inns in Portsmouth and Bangor. Recently, he coordinated the apartments at The Clark on Pleasant in Portland, and the Notre Dame on Cutts apartments in Saco.

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Frank holds an undergraduate degree from the United States Naval Academy and an MBA from the University of Michigan.

Dave Holman grew up in North Yarmouth, Maine before attending Carleton College. His Latin American Studies major took him to Bolivia where he co-founded The Spitting Llama Bookstore and Outfitter- a chain of retail stores. Dave has written three books: Youth Renewing the Countryside, Coffee Smuggler, and Cyber Fire. After earning his MBA at the University of Maine, Portland, he worked as Outreach and Communications Coordinator for Safe Passage and then as Assistant Director of Annual Giving for Bowdoin College. Dave has been a real estate investor since 2011 and is a agent for RE/MAX Riverside specializing in commercial and investment property where he leads the Holman Group of realtors. He co-owns rental over 150 residential and commercial rental units in Southern Maine and enjoys working with owners, residents and contractors to solve problems and improve communities. Dave has served on the board of the Ecology School in Saco and his local Budget Committee and Parks & Rec committee.

Matthew Arrants, ISHC, CHAM is the Founder and Principal of the Arrants Company, a hotel investment and advisory firm. Prior to November 2021, he was Executive Vice President of Pinnacle Advisory Group, working in both the Boston and Portland offices for over 25 years. While with Pinnacle he worked on numerous luxury hotel development projects including the Ocean House in Watch Hill, RI, the Morris Inn at Notre Dame University, the Williams Inn in Williamstown, MA. Matt is currently the President of the Hotel Asset Manager's Association (HAMA), from which, he has earned the prestigious Certified Hotel Asset Manager (CHAM) designation. He is also a former Chairman of the International Society of Hospitality Consultants (ISHC), a group of the hospitality industry's most respected professionals from across six continents.

Earlier in his career Matt worked in operations in various managerial capacities with Four Seasons Hotels and Resorts, and Rock Resorts. He lectures regularly at prestigious institutes of higher education and served as an adjunct professor at Boston University, teaching Hotel Asset Management. Mr. Arrants holds a Master's Degree in Hotel Administration from Cornell University and a BA in Political Science from Hartwick College.

Peter "Pete" Harrington has been a retail leasing expert in Greater Portland for over thirty years. Pete has an established reputation with both Tenants and Landlords. Portland's Downtown and Old Port areas have been a focus of Pete's from the beginning of his career. Pete's life long real estate career includes office, retail, industrial, sales and leasing, as well as investment property sales.

Pete grew up in Malden, Massachusetts. He earned a BA in Economics from the University of Lowell in 1985.

Pete has been an active volunteer over the years, including Portland Little League. After his kids aged out, he continued in the Challenger division, up until the Pandemic. He hopes to be back this Spring.

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Pete was the Maine Commercial Association of REALTORS® First Vice President in 2009 and 2010 and President in 2011 and 2012. In 2010, Pete was MCAR REALTOR® of the Year, an honor he again received in 2022 and in October, named the state-wide REALTOR® of the Year for the Maine Association of REALTORS®.

Pete has also spent countless hours volunteering with the Maine Association of REALTORS®. In 2017, Pete became their First Vice President and went on to become President in 2019. He was also on the National Association of REALTORS® Board from 2018 - 2020, the FIRST Commercial Broker to serve in both positions.

Pete is currently President Elect for Maine Listings and will be its President in 2023, again, the first Commercial Broker to be elected. Pete has served on almost every committee possible with the REALTORS® in Maine.

Pete is also a recurring presenter at MEREDA's Annual Forecast Conference.

Peter's affiliations include President Elect, Maine Listings (First Commercial Broker elected as President) | 2022 and 2023, Representative, State of Maine, Risk Management Issues Committee for the National Association of REALTORS® | 2022, 1st Vice President, Maine Listings Service (First Commercial Broker to serve) | 2021, Current Board Member, Maine Association of REALTORS® Legislative Committee | 2021, Current Member, Maine Association of Realtors Legislative Committee | 2021, 2022 & 2023, Director, National Association of REALTORS® (NAR) | 2018, 2019, 2020, President, Maine Association of REALTORS® (First Commercial Broker elected as President) | 2019, President, Maine Commercial Association of REALTORS® (MCAR) | 2011 & 2012

Nate Stevens joined The Boulos Company in 2007 after working with CBRE in Tucson, Arizona prior to moving back to Maine. Partner and Designated Broker, Nate works in all areas of commercial real estate including office, retail, industrial, development, and investment properties located in Central and Southern Maine. Nate has extensive experience working with local and national developers, investors, and companies including nonprofits, start-up businesses, state organizations, local municipalities, and large corporate companies. Nate is often asked to contribute to articles and be a panelist based on his knowledge of the commercial real estate market. He is also a regular speaker at the annual MEREDA conference where he presents on the status and future of the southern Maine office market.

A Portland, Maine native, Nate left to study at the University of Arizona where he received his bachelor's degree in Regional Development. He was an accomplished swimmer captaining the

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SPEAKER BIOGRAPHIES

Division 1 men's team to consecutive top four finishes at the NCAA Division 1 championships as well as earning All-American status and reaching a top 25 world ranking. This leadership and competitive spirit is what drives Nate's achievements in commercial real estate. Nate has a long, well-engrained family history in Portland; his great-great grandfather was famed regional architect John Calvin Stevens, a legacy which spawned his interest and passion for the local built environment.

Nate lives in the Deering Center neighborhood of Portland with his wife, Jane, and son, Carter. They enjoy summers on Little Diamond Island in Casco Bay.

Professional Affiliations/Accreditations include 2018 Maine Commercial Association of Realtors — Realtor of the Year, Maine Real Estate Broker License, Member, Greater Portland Chamber of Commerce, President, Maine Commercial Association of Realtors, President, Greater Portland Landmarks, Trustee, Portland Public Library.

Nate received a Bachelor of Science degree in Regional Development from the University of Arizona.

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Speaker Presentations and other related materials from today's event are available on the MEREDA website using this QR Code.



<https://mereda.org/resources/documents/>

This QR code will provide you with a map of the Cross Insurance Arena's Exhibitor Area located in the Concourse.



<https://mereda.org/wp-content/uploads/2023/01/24-x-36-Showcase-booth-layout.pdf>

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Maine Real Estate &
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Supporting Responsible Development

2023 Recognition Awards

Each year MEREDA is proud to recognize the individuals, businesses and organizations that have made a significant and lasting contribution to responsible real estate development in the state of Maine.

Robert B. Patterson, Jr. Founders' Award: Joshua T. Fifield, Clark Insurance

This career recognition award is to acknowledge members of MEREDA who have distinguished themselves by making significant contributions to the real estate industry and/or to MEREDA over many years. Josh Fifield of Clark Insurance has been selected to receive this year's Robert B. Patterson, Jr. Founders' Award.



Josh is a Vice President of the Business Insurance Department at Clark Insurance, working with business owners to identify their risks to help protect their hard work, assets, employees, and most importantly, their families. Active in the community, Josh has coached a variety of youth sports and has been the Safety Director for Portland Little League.

In 2014, Josh started volunteering with MEREDA as a committee member on the Marketing & Membership Committee. He joined the Board of Directors in 2017, a year he was also recognized with MEREDA's Volunteer of the Year Award. Over the years, Josh has also co-chaired MEREDA's Membership Committee and recently served as President from 2020-2022. It was Josh's steady hand that guided the organization during a time of unprecedented uncertainty and upheaval. Even with those challenges, under Josh's direction, MEREDA saw growth in membership and financial stability. He continues to serve on MEREDA's Membership and Executive Committees. We are grateful for Josh's unwavering dedication and leadership!

President's Award: Shelly R. Clark, Executive Director, MEREDA

The President's Award is given by MEREDA's current President in recognition of someone who has made significant contributions on MEREDA's behalf. This year's President's Award goes to none other than the incredible Shelly Clark, for her enduring contributions to MEREDA.



Shelly started with MEREDA in January 1997. That year the Forecast Conference had only 105 people in attendance. Shelly has helped grow that event and MEREDA into what it is today. Now, serving as MEREDA's Executive Director, Shelly manages all day-to-day operations, including coordinating educational programs, managing membership development, and providing support for board and committee activities. During the pandemic, Shelly went beyond the call of duty. Working from home, she kept the organization going. She was there to help everyone who needed it, from planning online events to supporting membership efforts. In short, you simply cannot think of MEREDA without thinking of Shelly Clark. She is literally the heartbeat of this organization, and has been for more than 25 years.

Shelly is originally from Houlton and proud of her roots in The County. Always a hard worker, Shelly was up at 4am picking potatoes at the age of 7 so she could get the "Dorothy Hamill" haircut at the Bangor mall. She now lives in Portland with her husband Alan. Shelly has always said that she has the best job in the world and that if she weren't doing this she'd be singing and touring with a band. We are so lucky to have Shelly as MEREDA's lead singer...she does it all, she does it well, and we simply couldn't get along without her.

Congratulations, Shelly!



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Public Policy Award: Senator Matthew Pouliot (R, Augusta)

This award is presented each year to an individual whose efforts have had a significant impact on public policy changes to benefit responsible real estate development in Maine. MEREDA is honored to present the 2023 Public Policy Award to Senator Matthew Pouliot of Augusta.



Senator Matt Pouliot is receiving this award for his leadership in housing creation policy, and for his support of MEREDA's efforts to advance responsible, practical, and predictable policies for real estate development. Senator Pouliot has been a steadfast supporter of MEREDA policy priorities, including his help in maintaining the Maine Historic Rehabilitation Tax Credit, his support for the establishment of a Commercial Property Assessed Clean Energy (CPACE program), his vote for the 2022 Housing Act, and his sponsorship of two MEREDA priority legislation items for the 131st Legislature. Additionally, Senator Pouliot has recently risen as a leader in bipartisan discussions about smart public policy to help curb Maine's housing crisis. This fall, he served on the Legislature's recent Commission to Increase Housing Opportunities in Maine by Studying Land Use Regulations and Short-term Rentals – the final report of which is the starting point for the work of the new Joint Select Committee on Housing, which Senator Pouliot was instrumental in establishing.

Senator Pouliot is also a leader in real estate sales and development in Kennebec County and beyond – most notably, he has helped revive the historic Water St. corridor in Augusta through redevelopment of downtown properties, including the New Purington Brothers Block - a 1916 neoclassical building which won a 2022 Maine Historic Preservation Award for its historic preservation success in its transformation to a multi use property with market rate apartments, retail and his real estate company, Pouliot Real Estate. His support for responsible real estate development, approach to policymaking, and service as a leader both in the legislature and in his hometown of Augusta make Senator Pouliot a clear choice for this year's 2022 Public Policy Award.

Volunteer of the Year Award: Ben Brennan, KONE Elevators

MEREDA's success is largely based on the support and commitment from its volunteer members. The Volunteer of the Year Award is awarded to those who selflessly and tirelessly give their time, talents, and energy to MEREDA and its efforts. This year's award goes to Ben Brennan of KONE Elevators.



Ben Brennan is a Senior Sales Executive for KONE Elevators, located in South Portland. Responsible for new equipment business development and project management, Ben partners with stakeholders of new and existing real estate developments in ME, NH, VT, and MA.

With MEREDA, Ben was an active and engaged participant on DevelopME's Committee early on, which led to him being named as co-chair in 2020. In this role, he worked to engage membership and create professional development opportunities within MEREDA for the next generation of industry professionals. In 2021, Ben started serving on MEREDA's Board of Directors, where his can-do attitude and interest in MEREDA's initiatives became even more evident. More recently, Ben joined the Local Issues Committee, and demonstrated his commitment by asking to become co-chair! Ben is happy to lend a hand when asked and has become a great addition and vocal advocate of MEREDA. We look forward to working with him for many years to come!

JOIN MEREDA TODAY!



Maine Real Estate &
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Supporting Responsible Development

Legislative advocacy

Educational programs

Networking opportunities

The **Maine Real Estate & Development Association (MEREDA)** is the state's leading organization of commercial real estate owners, developers and related service providers. Founded in 1885, MEREDA now has nearly 360 members who employ thousands of Maine citizens and invest millions of dollars in the Maine economy each year.

Our mission is to promote an environment for responsible development and ownership of real estate throughout the state of Maine. MEREDA achieves its mission through legislative advocacy, regulatory oversight, educational programs and conferences, and networking opportunities for members of the commercial real estate industry.

Our membership encompasses a wide array of companies and organizations, including developers, builders, property managers, brokers, attorneys, lenders, engineers, land use consultants, architects, appraisers, affordable housing advocates, housing authorities and municipalities.

In uncertain times like these it is more important than ever that we work together as real estate professionals. MEREDA makes sure our legislators understand the role of responsible real estate development in the overall health of our economy. We are a valuable business development and networking tool for our members. And our monthly educational seminars provide members with timely and useful information.

Join MEREDA today. Visit us at www.mereda.org or call Shelly Clark at (207) 874-0801.

Want to Become More Involved in MEREDA's Initiatives? Consider Joining a Committee!

Participation on any one of MEREDA's volunteer committees gives members yet another opportunity to raise their profile within Maine's real estate community, and help the association meet its goals. Committee work allows members to play an active role in the association's affairs and all members are encouraged to participate. Committee work also provides an opportunity to work alongside others in the real estate industry and is a good networking opportunity in itself.

- ◆ Our **Public Policy Committee** meets bi-weekly during legislative sessions. This committee reviews pending bills and regulations, identifying those of interest to our members, and works to ensure the real estate industry's concerns are considered. The committee labors to influence and shape the final form of proposed laws and regulations, and initiates new ones when circumstances warrant.
- ◆ The **Conference & Seminar Committee** meets monthly to develop ideas for upcoming conferences, seminars, and social events, suggesting possible topics, guest speakers, sponsors, formats, venues, and so on.
- ◆ Our **Membership & Marketing Committee** meets monthly to review membership statistics and trends, develops ways to retain current and recruit new members, looks for ways to further enhance the effectiveness of MEREDA's publications and other communications media and entertains ideas for new products and services that could be offered to the membership.
- ◆ The **DevelopME Committee** meets monthly to engage membership and create professional development opportunities within MEREDA for the next generation of industry professionals.
- ◆ The **Local Issues Committee** meets up to six-times per year to monitor and timely engage on local land use and development matters.

We encourage anyone who is interested in becoming involved in one, or more, of our committees, to reach out to Shelly R. Clark, Executive Director at MEREDA by calling 207-874-0801 or sending an email to info@mereda.org.

A Note About the MEREDA INDEX



MEREDA continues to work with Dr. Charles Colgan on the MEREDA Index, which serves as a barometer for development activity in the state's real estate sector. Now published annually, the Index features supporting commentary by experts from key real estate sectors.

The next edition of the MEREDA Index will be unveiled at the May 25th Spring Conference.

MEREDA MEMBERSHIP BENEFITS



Cornerstone \$5,000+

MEREDA's Cornerstone membership level includes exclusive benefits to member organizations that contribute significant amounts of both time and money to support MEREDA and its mission. For more information on the Cornerstone membership, please contact the MEREDA office at (207) 874-0801.



Sustainer \$2,500

Members at this level receive
Advocate benefits, PLUS:

- Up to 2 attendees FREE per annual conference
- Logo displayed at all MEREDA events
- Forecast Conference Exhibitor booth at a reduced Members at this level receive price of \$550 (regularly \$1000)
- Logo on website / social media promotion
- Name listed on MEREDA letterhead



Advocate \$1,200

Members at this level receive
Supporter benefits, PLUS:

- Forecast Conference Exhibitor booth at a reduced price of \$850 (regularly \$1000)
- Eligibility to be considered for the MEREDA Board of Directors
- Logo on website
- Unlimited attendees at the member rate for MEREDA events



Supporter

Corporate \$550 (includes up to 5 individual members at the member rate)

Individual \$385 | **Municipal / Government** \$300 | **Full-Time Student** \$50

All members at the **Supporter** level and above receive:

- Advocacy – Legislative and regulatory lobbying efforts
- Education & Insight – Breakfast events and annual conference, MaineBiz Real Estate Insider newsletter and MEREDA Index
- Networking – Breakfast events, annual conferences and socials
- Inclusion in members-only events
- Opportunity to submit and place an article for consideration in the MaineBiz Insider newsletter
- Opportunity to reserve a Forecast Conference Exhibitor booth at \$1000

See over for details.

MEREDA MEMBERSHIP BENEFITS

Cornerstone \$5,000+	Sustainer \$2,500	Advocate \$1,200	Supporter \$50 - \$550*	Benefits
√				Thanks/mention at all MEREDA events
√				Exclusive invitation to “Cornerstone Circle” events
√				Legislative monitoring and updates on real estate-related bills
√				First right of refusal for sponsorship opportunities
5	2			Number of attendees FREE per annual conference
√	√			Logo displayed at all MEREDA events
√	√			Social media promotion
√	√			Logo or name listed on letterhead
√	√	√		Logo on website
√	√	√		Eligibility for consideration for MEREDA Board of Directors
FREE	\$550	\$850	\$1000	Opportunity to reserve a Forecast Conference Exhibitor Booth (\$1000 value)
√	√	√	√	Advocacy – Legislative and regulatory lobbying efforts
√	√	√	√	Education – Breakfast events and annual conferences
√	√	√	√	Industry Insight – <i>Mainebiz</i> Real Estate Insider newsletter and MEREDA Index
√	√	√	√	Inclusion in members-only events
UNLIMITED	UNLIMITED	UNLIMITED	5	Networking – Member rate for attendees to MEREDA events
√	√	√	√	Opportunity to submit an article for consideration in the <i>Mainebiz</i> Real Estate Insider newsletter

**See over for details.*

(please complete reverse side)

Membership Directory Active member companies will be featured in our Membership Directory located on the MEREDA web site at www.mereda.org, with a brief description of the company's products and services. There is no additional fee for this listing. (Only member companies with current dues are eligible to be featured in our Membership Directory.) Please use the space below for your company's profile. *Attach additional sheet if necessary.*

MEREDA Dues Structure: MEREDA has four levels of membership: Supporter, Advocate, Sustainer and Cornerstone. All members will receive the same foundational benefits of a MEREDA membership: Advocacy, Networking, and Education & Insight, however, this structure rewards members for their support of the organization with added benefits at each level. *Please see attached for details.*

<i>2023 Membership Benefit Levels</i>	<i>Minimum Annual Dues</i>
<input type="checkbox"/> I = Full Time Student	\$50
<input type="checkbox"/> II = Municipal / Government	\$300
<input type="checkbox"/> III = Individual	\$385
<input type="checkbox"/> IV = Corporate (<i>Includes up to 5 individual members</i>)	\$550
<input type="checkbox"/> V = Advocate	\$1200
<input type="checkbox"/> VI = Sustainer	\$2500
<input type="checkbox"/> VII = Cornerstone	\$5000+

☐ *Check Here to Request an Invoice be Emailed to the Address Provided on Front*

For Your Convenience, we also Accept Visa or MasterCard

Card # _____ Exp. _____

Committee Participation Committee work allows members to play an active role in the association's affairs. I (*and / or one of my colleagues*) would like to join one or more committee.

☐ Conference & Seminar ☐ Membership & Marketing ☐ Public Policy Committee
☐ DevelopME ☐ Local Issues Committee

Name(s) & Email(s) _____

MEREDA expects members to adhere to its mission of developing Maine responsibly. Application is subject to review of MEREDA Board and/or executive committee. MEREDA is organized under IRS Section 501 (c) (6) rules.

For federal income tax purposes, dues paid to the Maine Real Estate & Development Association (MEREDA) are deductible as a business expense, not as a charitable contribution. A portion of dues, however, is not deductible as an ordinary and necessary business expense to the extent that MEREDA engages in lobbying. The non-deductible portion of dues is 30 percent. MEREDA is tax exempt under IRS Section 501(c)(6).

6 City Center, 3rd Floor | Portland, ME 04101 | www.mereda.org | Tel: (207) 874-0801 | Fax: (207) 899-4870 | Email: info@mereda.org

Our Members are Invested in What we Do

MEREDA's strength has always come from the support and participation of its valued members. Their generous support is critical to continuing MEREDA's advocacy work, educational programming, and other services that are so vital to those in Maine's real estate industry.

Thanks to their generosity, we have become the leading voice for responsible real estate development in Maine, representing hundreds of commercial real estate owners, developers and related businesses, from architects and engineers to property managers.

We are pleased to give special recognition to our Cornerstone and Sustainer Level Members. If you are interested in learning more about these levels of membership, please contact the MEREDA office.

Cornerstone Level Members:



America's Most Convenient Bank®



J. B. BROWN & SONS

Our Members are Invested in What we Do

Sustainer Level Members:



LEGISLATIVE ADVOCACY

WINTER 2023



MEREDA Introduces Three Bills to the 131st Legislature

The MEREDA Public Policy Committee (PPC) has submitted three pieces of legislation for consideration in the 131st Legislature. The three bills were submitted before the deadline on December 30, 2022 but have not yet been printed or given a reference number, known as a Legislative Document (LD) number. In brief, the bills focus on the following issues:

Reducing Housing Creator Risk by Establishing a Vested Rights Threshold for Municipal Land Use Permit Applications (Sponsored by Sen. Pouliot of Augusta). The purpose of this legislation is to reduce the risk for housing creators by ensuring that a housing creator can rely upon existing standards in the development of housing projects. To accomplish this goal, the legislation would establish a threshold upon which an applicant for a land use permit will have established vested rights and are entitled to review of their application based on the land use standards in effect at the time the permit is submitted. Specifically, the legislation would establish vested rights for a housing creator as of the date on which the municipal land use application is considered complete and ripe for review. The date on which the town deems the application to be complete is the date by which the housing creator established vested rights in the existing land use standards.

Aligning Maine's Elevator Fire Access Standards to the MUBEC (Sponsored by Rep. Crockett of Portland). The purpose of this legislation is to clarify Maine's standard for elevator fire access by aligning the standards in the building code with the inspection standards under the Department of Professional and Financial Regulation. Specifically, for purposes of review by Maine's Elevator and Tramway Safety Board, Maine's elevator fire access standards will be the standard in effect in the MUBEC. The MUBEC is comprised of international standards adopted to accommodate Maine specific needs by the Maine MUBEC Board, and regularly updated – it should be the universal standard in Maine. This legislation was submitted as an emergency measure, meaning that it will require 2/3 vote to pass, but will take effect immediately upon passage and gubernatorial approval.

Modernizing Condo Act to Permit Transfers of Unfinished Commercial Condos (Sponsored by Sen. Pouliot of Augusta). The purpose of this legislation is to update the Maine Condo Act to reflect modern land use practices by allowing the conveyance of an unfinished commercial condominium. Under current law, a condo cannot be transferred until it is fully finished. With today's use of commercial condominium spaces (many of which are ultimately finished into housing units) to accomplish affordable housing projects and repurpose huge properties like old mills, that old standard now poses unintended barriers. By updating the law, we can maintain protections for the end-user of the property (whether for residential or commercial) while allowing for expeditious land use transactions and housing creation projects.

MEREDA will be updating members once these bills have been printed and scheduled for a public hearing. If anyone is interested in helping to support this work, please reach out to Shelly Clark at info@mereda.org or Elizabeth Frazier at efrazier@pierceatwood.com.

LEGISLATIVE ADVOCACY

WINTER 2023

Joint Select Committee on Housing Must Work Closely with Other Legislative Committees

The 131st Legislature has established a Joint Select Committee on housing for the purpose of reviewing and ultimately acting to mitigate Maine's housing crisis. It remains to be seen how this committee will operate. For example, they may take testimony and hold hearings across the State to understand the scale of the housing crisis and the barriers to its resolve. Simultaneously, the legislature's committees of jurisdiction will review and consider individual bills submitted by legislators, many of which have a direct impact on housing. For example, the Environment and Natural Resources Committee (ENR) will have authority over proposed changes to the land use code and environmental regulations – two of the most significant factors in housing creation. Despite this, the Joint Select Committee on Housing will not be the committee acting on many of those issues.

MEREDA remains supportive of the Joint Select Committee on housing but believes it is critical for that committee to have influence over policy in other committees, like ENR, Labor and Housing, and State and Local Government, all of which have power to either significantly help or hurt the effort to build more housing. Ultimately, if housing is a top priority of this legislature, it must take priority over other matters, and that requires a coordinated effort by the Joint Select Committee. MEREDA will be actively advocating for this coordinated effort, and welcome anyone who is interested to reach out for more information.

MEREDA will continue to remain vigilant in protecting its members' interests. Our members represent a critical pillar of the state economy, and we will continue to advocate for policies that are fair, practical, and predictable even as we navigate a new, post COVID-19 environment.

HELP US MAKE A DIFFERENCE



MEREDA members can have a real impact on these important issues. We encourage our members to become involved in our legislative affairs, to attend our meetings, receptions and outreach opportunities.

MEREDA makes advocacy a high priority and we work hard throughout the year to give our members a voice in the legislative process. If you are interested in becoming involved please contact MEREDA's Executive Director, Shelly R. Clark at the MEREDA office at (207) 874-0801.

Listen Up! MEREDA Launches New Podcast!



MEREDA has a treat for you! The organization known for bringing people together for insightful discussions on all things related to real estate and development is taking to the airwaves, or rather the podcast waves!

On Jan 10th, MEREDA launched **MEREDA Matters**, a podcast that highlights the people, stories, and relationships behind the responsible development happening in Maine. **Check it out! >>>**



<https://mereda-matters.simplecast.com/>

MEREDA BOARD MEMBERS

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The Boulos Company

Executive Director / Board
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MEREDA

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**Introducing the New Class of Directors
Emeritus, MEREDA's Honorary Advisors**

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St.Germain

Shawn McKenna
Bangor Savings Bank

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Drummond & Drummond

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Commercial Properties, Inc.

Tim O'Neil
Monks O'Neil Development

Stephen Kasprzak
Kasprzak Builders, Inc.

Joseph Wishcamper
Wishcamper Companies

The induction of these individuals were recently
recognized at our anniversary gala in November.

Larry Wold, TD Bank | **Drew Swenson**, Swenson & Co.
Renee Lewis, Bloomfield Capital | **Dana Totman**, Retired from Avesta Housing

MEREDA's Upcoming Events

January 26, 2023 - 9:00 AM - 5:00 PM - MEREDA's Signature Event



2023 Annual Real Estate Forecast Conference & Member Showcase

Cross Insurance Arena, 1 Civic Center Square, Portland, ME

Along with the annual economic overview and outlook on Maine's economy, the conference also provides the popular market overview by property type focusing on both commercial and residential forecasts.

MEREDA's Member Showcase provides an excellent opportunity for exhibitors to network and market their products and services.

March 8, 2023 - 7:30 - 9:30 AM Morning Menu Breakfast Seminar Topic to be Determined Holiday Inn By the Bay 88 Spring Street Portland, ME 	March 30, 2023 - 5:00 - 7:00 PM MEREDA's Annual Spring Networking Social is back! Another great "meet-and-greet" opportunity, back after a 4-year hiatus! This must-attend event sells out every year, so sign up early! Hilton Garden Inn Downtown Portland Waterfront 65 Commercial Street, Portland, ME 
April 13, 2023 - 7:30 - 9:00 AM Morning Menu Breakfast Seminar - The Nightingale – a Deep Dive into the Mercy Hospital Renovation Holiday Inn By the Bay 88 Spring Street Portland, ME 	May 4, 2023 - 5:00 - 7:00 PM MEREDA's 9th Annual "Strikes for Scholars" Bowl-a-Thon Fundraising Event Bayside Bowl 58 Alder Street Portland, ME 
May 25, 2023 - 1:00 - 5:00 PM MEREDA's Annual Real Estate Spring Conference Details Coming Soon! Holiday Inn By the Bay 88 Spring Street 	June 8, 2023 - 7:30 - 9:00 AM Morning Menu Breakfast Seminar Topic to be Determined Holiday Inn By the Bay 88 Spring Street Portland, ME 



Maine Real Estate &
Development Association

Supporting Responsible Development

Dates Subject to Change - Please visit www.mereda.org for the latest updates.



Maine Real Estate &
Development Association

Supporting Responsible Development

Thank-You to Our Event Sponsors!

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PIERCE ATWOOD 

MEREDA Mission Statement

The Maine Real Estate & Development Association (MEREDA) is an organization whose mission is to promote an environment for responsible development and ownership of real estate throughout the State.

MEREDA'S GUIDING PRINCIPLE:

Practicality, Predictability, and Clarity in Regulation

Invest Wisely.

MEREDA's Membership Returns:

Advocacy for Responsible Real Estate Development

Legislative Representation | Regulatory Monitoring

Business Networking Opportunities

Publications | Seminars & Conferences

Reap ^{the} Dividends.



Maine Real Estate &
Development Association

Supporting Responsible Development

6 City Center, 3rd Floor | Portland, ME 04101

Phone (207) 874-0801 | Fax (207) 899-4870

www.mereda.org | info@mereda.org

MEREDA OFFICERS:

Craig Young
President

Shelly R. Clark
Executive Director
Board Secretary

Shannon Richards
Vice President

Jennifer Small
Vice President

Gary Vogel
Vice President

Mark Stasium
Treasurer



EVALUATION FORM - January 26, 2023 | Page 1 of 2

MEREDA's 2023 Real Estate Forecast Conference & Member Showcase

PLEASE GIVE US YOUR OVERALL EVALUATION OF EACH PROGRAM & PANELIST

Conference General Session _____Excellent _____Good _____Fair _____Poor

Member Showcase _____Excellent _____Good _____Fair _____Poor

PANELISTS:

Craig Young *Introductions* _____Excellent _____Good _____Fair _____Poor

James Marple *Economic Outlook* _____Excellent _____Good _____Fair _____Poor

Greg Payne *Welcome Address* _____Excellent _____Good _____Fair _____Poor

Justin Lamontagne *Industrial Forecast* _____Excellent _____Good _____Fair _____Poor

Sam LeGeyt *Industrial Forecast* _____Excellent _____Good _____Fair _____Poor

David Hughes *Bangor-Area Forecast* _____Excellent _____Good _____Fair _____Poor

Elizabeth Frazier *Legislative Agenda* _____Excellent _____Good _____Fair _____Poor

Brit Vitalius *Multi-Family Forecast* _____Excellent _____Good _____Fair _____Poor

Dava Davin *Single Family Forecast* _____Excellent _____Good _____Fair _____Poor

Frank Carr *Central Maine Forecast* _____Excellent _____Good _____Fair _____Poor

Dave Holman *Midcoast Maine Forecast* _____Excellent _____Good _____Fair _____Poor

Matthew Arrants *Vacation/Hospitality Forecast* _____Excellent _____Good _____Fair _____Poor

Peter Harrington *Retail Forecast* _____Excellent _____Good _____Fair _____Poor

Nate Stevens *Office Forecast* _____Excellent _____Good _____Fair _____Poor

WHY DID YOU JOIN US TODAY? Networking *vs.* Topic *vs.* CEUs *vs.* Employment Requirement? Other?

Comments on how the classroom environment could be improved : _____

GENERAL COMMENTS: Feel Free to Recommend Topics for Future Events _____

** SEE REVERSE SIDE **

STUDENT EVALUATION OF CONTINUING EDUCATION PROGRAM

DEPARTMENT OF PROFESSIONAL & FINANCIAL REGULATION
OFFICE OF PROFESSIONAL & OCCUPATIONAL REGULATION

MAINE REAL ESTATE COMMISSION

RETURN THIS EVALUATION TO YOUR PROGRAM INSTRUCTOR

You have just completed a program recognized by the Real Estate Commission as complying with the educational requirement for renewal or activation of your real estate license. The Commission is committed to excellence in real estate education and in that interest encourages your comments regarding the quality of this program. Your constructive comments on the instructor, course content and classroom environment will help us improve future programs. The Commission values your opinion and offers its sincere thanks for your cooperation in our effort to ensure quality real estate education. In addition to this evaluation feel free to contact the Commission directly with your comments.

PROGRAM SPONSOR/SCHOOL Maine Real Estate & Development Association (MEREDA)

PROGRAM TITLE MEREDA's 2023 Real Estate Forecast Conference

DATE M/01 D/26 Y/2023 LOCATION Cross Insurance Arena, Portland INSTRUCTOR Multiple Presenters

PLEASE CIRCLE YOUR RESPONSE TO THE FOLLOWING:

COURSE MATERIAL:

Course objectives were clear.

Course objectives were met.

Course material was well organized.

Course material was presented in sufficient depth.

Course is professionally beneficial.

I would recommend this program to my colleagues.

COMPLETE IF LIVE/CLASSROOM SETTING:

The instructor was knowledgeable in the subject.

The teaching methods used by the instructor were effective.

Instructor communicated subject matter well.

Instructor supervised course well.

COMPLETE ONLY IF DISTANCE LEARNING PROGRAM:

The course website was easy to navigate.

Instructions for using course materials were clear.

Technical support was readily available.

**Strongly
Disagree**

**Strongly
Agree**

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What did you like most about this program? _____

What did you like least about this program? _____

Additional Comments _____

** See Reverse Side **

Please Return this Form to the Registration Table Upon Completion