



**NATIONAL  
TRUST REAL ESTATE  
ASSOCIATION, INC.**

**Member Guide**

## **National Trust Real Estate Association, Inc.**

### **Summary**

National Trust Real Estate Association, Inc. (NTREA) was founded in 1973. It is a not-for-profit organization designed as an education and information resource for the trust real estate industry. Membership is open to trust real estate professionals.

NTREA provides educational programs at the annual NTREA Educational/Development Forum. The Forum features both outside speakers and members presenting on a variety of fiduciary topics related to trust real estate. In addition, members actively participate in “Share and Compare” sessions that provide an opportunity to discuss industry issues.

A number of members hold professional designations from real estate and fiduciary organizations. Attendance at some NTREA programs may qualify members for continuing education credits. Prior to attending any educational programs offered by NTREA, members should contact the Executive Director with their continuing education credit requirements.

An annual meeting of the membership is held at the NTREA Educational/Development Forum.

NTREA communicates with its members through e-mail and the web site [www.ntrea.org](http://www.ntrea.org)

Inquiries may be addressed to:

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### **Governance**

NTREA is incorporated in the state of Wisconsin. The By-Laws of the Association are available from the Executive Director upon request.

NTREA is governed by an Executive Committee and a Board of Directors. The Executive Committee is comprised of the President, Vice President, Treasurer and Executive Director. The Board of Directors is comprised of the Executive Committee, the Secretary, the immediate Past President and the Chairpersons of the Standing Committees (Audit, Membership, Resource, and Friends).

The role of the Executive Committee is to address critical issues that must be addressed prior to the next regularly scheduled meeting of the Board of Directors. It is the responsibility of the Board to direct the ongoing operations of the Association. The Executive Director is responsible for the administrative and financial activities of the Association.

### **Membership Information**

NTREA has two membership categories, Individual and Corporate.

Individual members are fiduciary real estate professionals who act in an individual fiduciary capacity or are employed by a financial institution.

Corporate Membership is available to any corporate fiduciary. This membership allows the corporation to designate eligible trust real estate professionals as members. These members enjoy all the benefits of individual membership. Corporations under this membership category benefit from a reduced rate.

The current individual membership dues are \$100.00. Corporate members currently pay \$900.00. Corporate membership includes annual dues for up to five members and two registration fees for the annual Educational/Development Forum.

### **Friends of NTREA**

“Friends of NTREA” is a select group of vendors that provide products and professional services to NTREA members. A designated display area at the annual Forum and a special section on the NTREA website ([www.ntrea.org](http://www.ntrea.org)) allow Friends to showcase and market their products and services. Friends of NTREA currently pay an annual fee of \$2,300.00. NTREA members frequently use products and services offered by Friends of NTREA.

### **NTREA Web Site**

The NTREA website at [www.ntrea.org](http://www.ntrea.org) provides information about the organization and other subjects pertinent to the trust real estate profession.

The website is comprised of a public access section and a “members only” section. Among the many features are articles of interest, updates about the annual Educational/Development Forum, job postings, business links and news about our members and friends.

## **Educational Resources**

NTREA's primary objective is to be an educational resource for its members. This is achieved through three different communication channels:

- The annual educational/development forum
- E-mails, and
- The NTREA website.

**NTREA's Educational/Development Forum** is our organization's main event and a high focus is placed on educational programs. We stress the importance of attending the annual Forum where attendees can focus on a variety of industry related topics and interact with other trust real estate professionals as well as representatives from various service providers. Each agenda features a full slate of professionals presenting on a wide range of pertinent topics. At the Forum's informal Share & Compare discussions members share knowledge, experience and insight about specific challenges on trust/real estate issues. Many attendees find these sessions to be the most valuable part of the Forum.

NTREA provides educational material on the NTREA website. Features include summaries of Educational/Development Forum presentations, real estate market updates and emerging legislation that affects our industry.

## **NTREA – A Valuable Networking Resource**

A major benefit of NTREA membership is the opportunity to network with fellow trust real estate professionals. The Educational/Development Forum provides the most direct opportunity. However, networking is a year-round resource. Our members have a history of sharing their expertise and calling upon each other to assist with challenging issues. This is a resource that money can't buy.

## **Getting Involved**

If you are interested in serving as an Officer or on a Committee (a great way to learn how NTREA operates and to make a contribution to the Association), or if you know of other trust real estate professionals who may benefit from NTREA Membership, please contact Jeanne Moore at [jmoore@ntrea.org](mailto:jmoore@ntrea.org) to volunteer or to make a referral.

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