

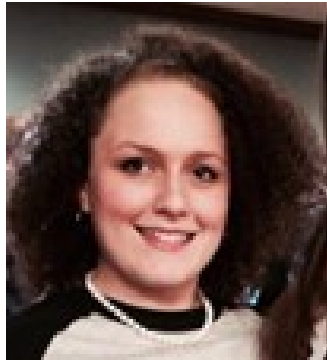
# The Voice

## Monthly Newsletter



*The Voice of the 1031 Industry*

[My Profile](#) | [Events](#) | [Advocacy](#) | [CES@ 1031](#)



## President's Message

### **Amanda Schmunk, Homestead Escrow and Exchange Company**

What a wonderful annual conference in Santa Fe! It is crazy that the conference was already more than a month ago, but it was such a wonderful week with all of you that were able to join us!

I want to thank all of those that made it such a success, including our Event Planner, Kerigan, and her team with Amplify, the Conference Planning Committee, and of course, our wonderful sponsors! It is always great to see everyone in person, as well as receiving such great continuing education. I am already looking forward to the annual conference next year in Austin, Texas.

My main goal as the president this year is growth for the FEA. This may come in different forms, whether that is growing the number of members in the FEA with our new Professional Membership, or growing the number of current members that are actively involved in the FEA. One of the main topics that was brought up by many at the conference was the idea of getting involved! The FEA is managed by Amplify but run by a fully volunteer group of people in our industry. As we continue to grow, and want to help the FEA thrive, that means that we need everyone to contribute, whether that is through their time, or finances. The strength of the FEA depends on its volunteers, and the passion that they have to be involved and maintain, as well as grow, the FEA.

I told a story in my speech at the conference that I accidentally signed up for EVERY committee at my first annual conference, and while I don't recommend that, I do ask that everyone find the committee that best suits them and get involved. Many of the committees do not require a large time commitment, some even less than an hour every other month, or on an "as needed" basis. We all have talents and experiences that can benefit the FEA and help improve the 1031 industry that we all love.

We have a great year ahead of us, and the different committees would all appreciate more input and involvement from our members. Let's get involved, let's grow the FEA, and let's have a great year! Thank you all for your warm welcome as the incoming president, and I look forward to working with you all this year!



## FEA 2023 Annual Conference

More than 215 members attended the 2023 FEA Annual Conference in Santa Fe, New Mexico, Sept. 19-21.

Those in attendance heard from more than 16 general-session speakers on topics such as ethics, thorny 1031 exchange issues and complicated reverse exchanges.

FEA extends sincere thanks to our 24 conference sponsors.

Sponsors met with conference attendees throughout the week to discuss the business-related services they provide for QIs and like-kind exchanges.

In addition to the general sessions, FEA members also participated in the organization's annual meeting of members at the conference luncheon on Wednesday, Sept. 20. At the meeting, members ratified the slate of new board members and approved a change to the FEA bylaws aimed at allowing the FEA 1031 PAC to reach employees of member companies who wish to support the FEA PAC, but are obligated under another PAC. Under the change, individual members of FEA will now be able to vote for one seat on the FEA board of directors. The change will take effect in 2024.

FEA also hosted a new member orientation for new members and first-time attendees. At the event, participants heard from FEA board members and committee chairs about the various benefits of FEA membership.

FEA's 2024 annual conference will take place in Austin, Texas, Sept. 16-18. We look forward to seeing you in Texas!

---

## FEA Elects Officers and Board Members for 2023-2024

FEA elected the following officers and board members at the 2023 annual conference. Regular board members can serve two three-year terms. The affiliate board member serves one three-year term. Officers serve for one year in their elected role.



### **2023-2024 FEA OFFICERS**

*(Pictured from Left to Right)*

**Immediate Past President:** James Miller, Esq., Investment Property Exchange Services, Inc. (IPX1031)

**President:** Amanda Schmunk, CES®, Homestead Escrow and Exchange Company

**Vice President:** Al Caporale, Esq., CES®, Exchange Authority, LLC

**Secretary-Treasurer:** Craig Brown, Esq., Investment Property Exchange Services, Inc. (IPX1031)

### **FEA BOARD MEMBERS**

Regular board members elected in 2023:

**Amanda Schmunk**, CES®, Homestead Escrow and Exchange Company, Sioux Falls, SD (second three-year term)

**Steve Holtkamp**, Accruit, LLC, Denver, CO (first full three-year term)

**Mark Adams**, First American Exchange Company, Lake Oswego, OR (first three-year term)

**Jamie Kingdom**, CES® Banker Exchange, LLC, Greenville, SC (first three-year term)

Affiliate board member elected in 2023:

**Mario D'Amore**, Capital One Bank of New York (first full term)

---

## FEA Awards Longtime Leaders at Annual Conference

FEA recognized the following leaders at the 2023 annual conference:



### **2023 FEA President's Award: Lynn Harkin, Amplify**

Lynn Harkin served as the FEA executive director for 10 years and is retiring in December 2023. Lynn has been with FEA since the association moved to Amplify Association Management (then called AML) in 2013.

As executive director, Lynn was responsible for managing FEA's day-to-day administration and operations. She provided guidance for new board leaders, directed FEA's budget, oversaw membership recruitment efforts and managed FEA's relationship with the CES® programs, among other duties.

*(Lynn is pictured with FEA President Jim Miller)*



### **2023 Margo McDonnell Certified Exchange Specialist® Perpetual Award: Steve Chacon, First American Exchange Company**

Steve was honored with the 2023 Margo McDonnell Certified Exchange Specialist® Perpetual Award for actively promoting CES® within his company by helping those interested in obtaining the designation. He was also nominated for his efforts to preserve Section 1031 when he served as FEA President and as a current member of the Government Affairs Committee, and for his work on the nominations and ethics committees.

*(Steve is pictured with Council Member Mike Brady)*





### **2018-2023 Board Service:**

#### **Julie Baird, First American Exchange**

Julie served on the FEA board from 2018-2023. She also served as FEA President in 2020-2021. Julie led the association through a worldwide pandemic and one of the industry's tougher legislative battles with President Biden's proposed \$500,000 cap on Section 1031. She has played a key role in supporting FEA's advocacy efforts to educate members of Congress about the economic importance of Section 1031.

*(Julie is pictured with FEA President Jim Miller)*



### **2018-2023 Board Service:**

#### **Toija Beutler, First American Exchange**

Toija served on the FEA board from 2018-2023. She has also led FEA's membership recruitment as co-chair of the Membership Committee. In that capacity, Toija reaches out to prospective members, approves member applications, follows up with member inquiries, and ensures that any members who choose not to renew get one more chance to make the decision.

*(Toija is pictured with FEA President Jim Miller)*



### **2018-2023 CES® Council Service:**

#### **Debbie Bannister, Exchange Resources, Inc.**

Debbie served on the CES® Council from 2018-2022. She served with dedication and commitment to the Council's certification exam participants, CES® Designees and continuing education programming. Debbie has also served on the FEA Conference Planning Committee.

*(Debbie is pictured with Council Member Mike Brady)*

---

## **FEA Hosts Charity Bike Ride at Annual Conference**



FEA members contributed \$943 for a charity bike ride held in conjunction with the FEA 2023 Annual Conference in Santa Fe, New Mexico.

Riders gathered in the early morning on Tuesday, Sept. 19 to participate in the 25-mile road ride.

Contributions will go to the [Adelante Program](#), a local charity through the Santa Fe public school system aimed at helping students and families who are experiencing homelessness or housing instability.

The program supports basic needs such as school supplies, food, transportation, and clothing.

The event was organized by FEA Past President, Brent Abraham. Abraham says he hopes to organize a similar ride at next year's annual meeting in Austin, Texas.



## Welcome New Members

### Regular Members



Reliable 1031 Exchange,

LLC

Los Angeles, CA

[Reliable1031.com](https://reliable1031.com)

### Professional Advisor Member





## FEA 1031 PAC: Upcoming Events

The FEA 1031 PAC contributes to members of Congress of both political parties and is funded by eligible individual employees.

### Upcoming FEA 1031 PAC fundraisers:

**Senator Thom Tillis (R-NC) – Nov. 6 at 6:30pm ET**

**Senator Marsha Blackburn (R-TN) – Nov. 7 at 5pm ET**

**Senator Jon Tester (D-MT) – Nov. 13 at 6pm ET**

To become eligible, individuals must be employed by FEA member companies that have filed a Permission to Solicit form. A Permission to Solicit form is required by the Federal Election Commission before FEA can solicit eligible employees of member companies. Member companies are only permitted to grant one trade association permission to solicit their employees per calendar year.

FEA Member Key Contacts can find a Permission to Solicit Form [here](#).

For more information, please contact Kimberly Steenhoek at [director@1031.org](mailto:director@1031.org).

## Message from Executive Director Kimberly Steenhoek



Thanks to everyone who attended the annual conference in Santa Fe. It was a whirlwind week filled with educational sessions, association business meetings and social networking events. I hope that you found your time in Santa Fe to be both enjoyable and productive.

As we look toward the year ahead, FEA planning for 2024 is already in full swing. 2024 membership materials will be emailed in early November. We will be sending renewal notices electronically to key contacts this year instead of using postal mail. Please be on the lookout for those emails in the next month. As always, if you have any questions, please feel free to email me at [director@1031.org](mailto:director@1031.org).