

# Real Estate Securities & Syndication Institute Research Guide

## NAR Archives Research Guide

The National Association of REALTORS® Archives produces Research Guides with the goal of helping members, scholars, and staff locate information held in the Archives. Each Guide covers one series of records, providing historical background and context on how the materials relate to NAR as a whole. In addition, the Guides contain content lists, brief notes about the materials, and box locations within the Archives. Researchers can use these Guides to gain a better understanding of the materials and quickly decide which records may be most relevant to their research.

## Real Estate Securities & Syndication Institute (RESSI)

### Series D14

<https://realtor.soutrnglobal.net/Portal/Members/en-US/RecordView/Index/5931>

The Real Estate Securities & Syndication Institute (RESSI) was founded in 1972 as the ninth affiliate of NAR. The concept of real estate securities as an industry was first proposed within the California Association of REALTORS® committee structure in 1966, “when a committee was created to accommodate the need for education and recognition of those REALTORS® and their professional associates in the practice of real estate in the security form.” The Real Estate Security Institute (RESI) was established in 1971 to discuss state and federal regulatory implications on the real estate securities industry. In 1972, RESI merged with NAR’s real estate security efforts and became RESSI. RESSI’s purpose was to provide education and guidance on the national real estate securities market and build a strong relationship between the state and federal regulatory communities. RESSI also offered accredited certifications to its members such as Specialist in Real Estate Securities (SRS), demonstrating their training and professional knowledge in real estate securities. RESSI was dissolved in 1990 and the responsibilities of the institution were integrated with NAR.

## Collection:

### D14:01 RESSI organization & operation

#### D14:01 Box 1

- RESSI By-Laws and Amendments, 1975-1978.
  - Includes committee correspondence about by-law amendments and copies by-laws with amendment proposals.
- RESSI company correspondence, memorandums, proposals, and articles, 1972-1996.
  - Includes committee and member correspondence, budget proposals, inter-office memorandums, committee proposals, and financial statements. It also includes news articles pertaining to the history and formation of RESSI.
- Position statements and cooperation agreements between RESSI and NAR, 1972-1995.
  - Contains 1972 and 1974 NAR position statements on RESSI including proposals on rules and regulations, financing terms, facilitation and diversification. It also includes a Mutual Cooperation Agreement between NAR and RESSI in 1995 with company correspondence and memorandums regarding the agreement.
- RESSI member packet, 1972
  - Includes articles of incorporation, by-laws, blank meeting minutes sheets, and blank stock certificates.

#### D14:01 Box 2

- RESSI evaluation report, 1977
  - Booklet containing RESSI institutional problems, recommendations/solutions, and goals and objectives for the organizational structure of RESSI. There are 10 copies of this booklet.

## **D14:02 RESSI governance & leadership**

### **D14:02 Box 1 (located in D14:01 Box 1)**

- RESSI Board of Directors/committee meeting minutes and proceedings, meeting notes and agendas, and photographs, 1960-1986.
  - Including meeting agendas/notes, board of directors and committee minutes, task reports from prior meetings, Board of Directors/President correspondence. It also includes photos of committee officials and board of directors specifically chosen to be added to the RESSI Review commemorating the President's message in 1976.

## **D14:03 RESSI Membership Rosters, Guidelines, & Recruiting Material**

### **D14:03 Box 1**

- RESSI membership directories including committee rosters, officers, staff, and designees, 1982-1986.
- RESSI membership brochures including standards of professional practice, member benefits, and services provided, 1973-n.d.

## **D14:04 RESSI Education & Designations**

### **D14:04 Box 1-2**

- Coursebooks, 1972-1981.
  - RESSI Manual, 1972.
  - Sponsoring Real Estate Securities Programs: Course II, 1974.
  - Advanced Techniques in Real Estate Syndication: Course II, 1976.
  - How to Register as a DPP Broker/Dealer, 1981.
  - Partnership and DPP Broker/Dealer Administration, 1981.

### **D14:04 Box 2**

- Course pamphlets, workshop fliers, catalogs, and blank certificates, 1976-1987.
  - Includes portfolio of products and services that provides membership information, annual courses offered, and designation information. It also contains blank RESSI certificates, RESSI library subscription, and workshop fliers.

### **D14:04 Bound Materials**

- Real Estate Securities and Syndication: A Workbook, 1973.

## **D14:05 RESSI Conventions & Meetings**

### **D14:05 Box 1 (located in D14:04 Box 2)**

- Conference and seminar pamphlets and brochures, and meeting agendas 1976 – 1995.
  - Includes RESSI conference pamphlets, convention meeting schedules, and a summit and symposium brochures. It also includes a 1994 meeting agenda/schedule between REIA (also known as RESSI) and NAR. The agenda contains terms of the coalition, correspondence with participants, and talking points.

### **D14:06 RESSI Publications**

#### **D14:06 Box 1-3**

- Newsletters, 1973-1989.

#### **D14:06 Box 4-7**

- The Real Estate Securities Journal, 1980-1988.

#### **D14:06 Bound Materials**

- Real Estate Securities and Syndication Institute Newsletter, 1973-1974.