



# Practicing Affiliate Policy Manual

---

Effective May 10, 2024

Copyright © 2023 Appraisal Institute. All rights reserved.

Printed in the United States of America. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopy, recording or otherwise, without the prior written consent of the publisher.

# Contents

Practicing Affiliate Definitions.....	3
Referencing Practicing Affiliates .....	3
Initial Standards and Ethics Education Requirement.....	4
Termination from the Practicing Affiliate Category .....	4
Rules Pertaining to Readmission to the Practicing Affiliate Category.....	4
Continuing Education Requirements for Readmission .....	5
Former AI professionals that did not meet their Initial Standards and Ethics Requirement.....	5
Former AI professionals that were in a five (5) year AI CE Cycle.....	5
Continuing Education Requirements .....	6
Practicing Affiliate AI CE Requirements .....	6

## Practicing Affiliate Definitions

A Practicing Affiliate is an individual who:

- a) is a Practicing Affiliate with the Appraisal Institute; and
- b) provides Service(s) as defined by the Code of Professional Ethics.

A Practicing Affiliate in good standing meets the criteria set forth above in this Section and is not:

- a) suspended;
- b) the subject of a disciplinary proceeding as defined in the Regulations of the Appraisal Institute; or
- c) the subject of a peer review proceeding in which the Practicing Affiliate has been sent an offer of a publishable disciplinary action as set forth in the Regulations of the Appraisal Institute.

An International Practicing Affiliate is a Practicing Affiliate whose principal place of business and residence falls outside the United States, United States Territories and Canada.

## Referencing Practicing Affiliates

Practicing Affiliates and Affiliates may only refer to themselves by those terms on letterhead, business cards, websites, and other advertising materials and under a heading entitled “professional associations.” Practicing Affiliates and Affiliates may use these terms only in conjunction with the name of an individual and not in connection with the name, logo, or signature of any firm, partnership, or corporation. Practicing Affiliates and Affiliates may not abbreviate these terms or place these terms under a heading entitled “professional designations” or “professional memberships.”

### Correct

Jane Doe, Practicing Affiliate, Appraisal Institute

### Incorrect

Jane Doe, Practicing Affiliate Member, Appraisal Institute  
Jane Doe, P.A.

### Why Incorrect?

Cannot reference “membership.”  
Cannot abbreviate.

## Initial Standards and Ethics Education Requirement

Except as otherwise provided, each Practicing Affiliate must complete the Initial Standards and Ethics Requirement, within the four (4) year period prior to becoming a Practicing Affiliate or within the first twelve (12) months after admission to the Practicing Affiliate category. To complete this requirement an individual must:

- a) Standards course; and
- b) AI *Business Practices and Ethics* course.

Once the Initial Standards and Ethics Requirement is completed the Practicing Affiliate will continue with their 5-year AI CE Cycle.

## Termination from the Practicing Affiliate Category

Practicing Affiliates may become terminated due to resignation, failure to pay annual affiliation fees, failure to complete Initial Standards and Ethics Requirement, failure to complete AI Continuing Education requirements, the disciplinary action of expulsion or other basis set forth in the Bylaws, Regulations or policies and procedures of the Appraisal Institute.

## Rules Pertaining to Readmission to the Practicing Affiliate Category

An Applicant for readmission must:

- a) pay a non-refundable application fee and pay in full of all outstanding dues, fees or other indebtedness owed the Appraisal Institute during the individual's former membership, candidacy and/or affiliation; and
- b) possess good moral character, be in good standing; and
- c) meet the applicable continuing education requirements for readmission.

Unless:

- a) the individual was terminated with a decision that the individual may not apply for readmission to the Practicing Affiliate category, in which case the individual may not apply for readmission; or
- b) the individual was terminated with a decision that the individual may reapply after a certain period of time, in which case the individual may only apply for readmission to the Practicing Affiliate category after the specified time period.

## Continuing Education Requirements for Readmission

### Former AI professionals that did not meet their Initial Standards and Ethics Requirement

If the applicant resigned or was terminated without completing their Initial Standards and Ethics requirement, they must provide proof that they have, in the four (4) years prior to readmission, completed:

- a) Standards course;
- b) AI *Business Practices and Ethics* course; and
- c) Fair Housing course.

If the applicant is readmitted as a Practicing Affiliate, he or she shall be placed on a continuing education cycle commencing on the date of readmission and expiring on the sixth June 30th following readmission. Within this cycle, Practicing Affiliates must complete the applicable continuing education requirements set forth in Regulation No. 10.

### Former AI professionals that were in a five (5) year AI CE Cycle

- a) If the applicant applies for readmission on a date that falls within the same five (5) year period (most recent continuing education cycle) during which the individual's affiliation was terminated, then the applicant shall have no continuing education requirements for readmission. The applicant shall be readmitted as a Practicing Affiliate and shall return to the same five (5) year AI continuing education cycle he or she held at the time of the most recent termination.
- b) If the applicant applies for readmission on a date that does not fall within the same five (5) year period (most recent continuing education cycle) during which the individual's affiliation was terminated, then such individual shall, within the four (4) years prior to the date of readmission, have completed the following continuing education requirements:
  - i. Standards course;
  - ii. AI *Business Practices and Ethics* course; and
  - iii. Fair Housing course.

If the applicant is readmitted as a Practicing Affiliate, they will be placed on a continuing education cycle that commences on the date of readmission and expiring on the sixth June 30th following readmission.

Applications for readmission to the Practicing Affiliate category will be processed in accordance with the Bylaws, Regulations, and policies of the Appraisal Institute.

## Continuing Education Requirements

The Appraisal Institute offers both classroom and online programs that meet AI Continuing Education (CE) requirements. Practicing Affiliates must complete the continuing education requirements set forth in Regulation No. 10: Continuing Education

### Practicing Affiliate AI CE Requirements

During each five (5) year AI CE cycle the following is required:

- Standards course\*
- *AI Business Practices and Ethics*
- Fair Housing course
- 350-Points of Continuing Education

Access your AI CE Checklist by logging into your account.

\*The Standards of Valuation Practice (SVP), promulgated by the Appraisal Institute and the Certification Standard of the Appraisal Institute; or applicable national or international Standards and the Certification Standard of the Appraisal Institute.

[AI Continuing Education: An Overview](#) (PDF)

AI Membership

P: (312) 335-4111

E: [ce@appraisalinstitute.org](mailto:ce@appraisalinstitute.org)

E: [admissions@appraisalinstitute.org](mailto:admissions@appraisalinstitute.org)

7/15/24cv