



# Associate Member Policy Manual

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# Contents

- Associate Member Definitions.....3
  - Candidates for Designation Subcategory ..... 3
- Referencing Associate Members ..... 3
- Initial Standards and Ethics Education Requirement ..... 3
- Rules Pertaining to Admission to the Associate Member Category ..... 4
- Termination from the Associate Member Category..... 5
- Rules Pertaining to Readmission to the Associate Member Category ..... 5
- Continuing Education Requirements for Readmission..... 6
  - Former AI professionals that did not meet their Initial Standards and Ethics Requirement..... 6
  - Former AI professionals that were in a five (5) year AI CE Cycle..... 6
- Continuing Education Requirements..... 7
  - Associate Member AI CE Requirements..... 7

## Associate Member Definitions

This manual is applicable to Associate Members who **are not** Candidates for Designation. Candidates for Designation may refer to Regulation Nos. 1, 2, 3, the Candidate for Designation Policy Manual, and other applicable policies and procedures.

An Associate Member is an individual who is engaged in Valuation Practice as defined by the Code of Professional Ethics but does not hold an Appraisal Institute designation.

An International Associate Member is an Associate Member whose principal place of business and residence falls outside the United States, United States Territories and Canada.

### Candidates for Designation Subcategory

Candidates for Designation are a subcategory of Associate Members. Candidates for Designation are Associate Members who are on paths to obtain one or more Appraisal Institute designations. Additional requirements applicable to Candidates for Designation, including admission, suspension, termination and readmission, may be found in Regulation Nos. 1, 2 and 3.

## Referencing Associate Members

Associate Members may only refer to themselves by those terms on letterhead, business cards, websites, and other advertising materials and under a heading entitled “professional associations.” Associate Members 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. Associate Members may not abbreviate these terms or place these terms under a heading entitled “professional designations.”

### Correct

Jane Doe, Associate Member, Appraisal Institute

### Incorrect

Jane Doe, A.M.

### Why Incorrect?

Cannot abbreviate.

## Initial Standards and Ethics Education Requirement

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

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

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

## Rules Pertaining to Admission to the Associate Member Category

Each Associate Member shall abide by, uphold, and conform his or her actions to the Bylaws, Regulations, Code of Professional Ethics and Standards of Professional Practice of the Appraisal Institute, as each may be amended from time to time. Each Associate Member shall also abide by, uphold, and conform his or her actions to such policies and procedures as the Board of Directors or duly authorized bodies or individuals of the Appraisal Institute may promulgate from time to time.

### Formal Application

Except where provided otherwise, each Applicant for admission as an Associate Member must agree, certify or attest to the following as applicable, as well as to any other requirements the Appraisal Institute may require in the admissions process:

- a) complete the official application form;
- b) sign an irrevocable waiver of any claims or causes of action that he or she may have at any time against the Appraisal Institute, its Board of Directors, officers and committees, or members thereof, or any Chapter or Region and all Designated Members, Associate Members, Affiliate Members or other persons cooperating with the Appraisal Institute in its official activities;
- c) sign an agreement to comply with and uphold the Bylaws, Code of Professional Ethics, Standards of Professional Practice and Regulations of the Appraisal Institute, as modified from time to time;
- d) certify to an understanding that, as an Associate Member, he or she is not a Designated Member of the Appraisal Institute;
- e) certify to an understanding that any misuse of Associate Member status may subject him or her to peer review proceedings conducted pursuant to Regulation No. 6;
- f) Have completed the Initial Standards and Ethics Education Requirement or complete such requirement within the first twelve (12) months after admission as an Associate Member;
- g) truthfully answer the items related to good moral character on the application form and fully disclose information related to a possible lack of good moral character; and
- h) pay a non-refundable application fee and all outstanding dues, fees or other indebtedness owed to the Appraisal Institute.

An individual who knowingly makes false statements, submits false information or fails to fully disclose information requested in an application for admission as an Associate Member shall be subject to discipline pursuant to Regulation No. 6. In addition, an individual who, while an Associate Member, is convicted of a crime committed prior to application for Associate Member shall be subject to discipline pursuant to Regulation No. 6.

## **Good Moral Character**

Each Applicant for admission as an Associate Member must have good moral character. From the date of submission of the application as an Associate Member to the date of admission as an Associate Member, an Applicant shall immediately disclose to the Membership Department circumstances and events occurring after the date of submission of the application that may have a material bearing on the Applicant's character. If information contained in the application or in the Appraisal Institute's files indicates that the Applicant may lack good moral character, then the application shall be processed pursuant to the policies and procedures further implementing this Regulation.

## **Termination from the Associate Member Category**

Associate Members 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 Associate Member 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 Associate Member 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 Associate Member 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 education requirement.

If the applicant is readmitted as an Associate Member, 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, Associate Members 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 an Associate Member 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 education requirement.

If the applicant is readmitted as an Associate Member, 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 Associate Member 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. Associate Members must complete the continuing education requirements set forth in Regulation No. 10: Continuing Education

### Associate Member AI CE Requirements

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

- Standards course\*
- *AI Business Practices and Ethics*
- Fair housing education requirement
- 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

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