

Valerie A. Lee, M.S.



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SUMMARY

Residential, commercial, HOA and affordable housing professional with strong background in property management, property operations, accounting, financial management, budget preparation, creating and executing in-person and virtual training events, project management, work plans, variance analysis, maintenance and capital improvements, risk management, vendor negotiations, leasing, and resident services. Knowledgeable on CAM reconciliations, lease administration, Yardi Voyager, Asana, AppFolio, HUD, Salesforce, Association Management Specialist, Certified Manager of Community Associations, Certified Community Association Manager, Certified Occupancy Specialist, Tax Credit Specialist, Section 8, re-certifications (initial, annual, and interim), project based and housing choice vouchers, fair housing, LIHTC income limits, rent calculations, and landlord tenant laws and issues.

PROFESSIONAL EXPERIENCE

Habitat for Humanity Greater San Francisco (HGSF)

San Francisco, CA

Community Associations Manager

January 2022 – Present

- Help set up new HOAs by reviewing and editing governing documents (CC&Rs, Bylaws, Articles of Incorporation, Rules and Regulations), service provider contracts, and warranties
- Ensure that HOAs are established according to applicable laws, best practices and HGSF standards
- Educate homeowners and board members in the purposes, powers, rights and obligations of HOAs
- Serve as advisor to 14 Boards of Directors for all legal, financial, and operational matters
- Review HOA finances and Reserve Studies, including profit and loss variances and funding status
- Help select, manage and oversee HOA property managers and other HOA service providers
- Collect data on outcomes and impacts of HOAs to identify areas for improvement and solutions
- Panelist at California Association of Community Managers Law Seminar on Association Elections
- Panelist at the Habitat for Humanity International Conference on Homeowner Associations

BanCal Property Management

San Francisco, CA

Community Manager (HOA Property Manager)

June 2021 – January 2022

- Managed all aspects of eight homeowner associations exceeding \$3MM in total assets
- Provided in-person and virtual educational classes for HOA board members and HOA members
- Served as the advisor to eight Boards of Directors for all legal, financial, and operational matters
- Developed annual operating budgets and present to internal stakeholders and partners
- Tracked and managed finances, including financial reporting, forecasting, and creating budgets
- Supervised Assistant Community Manager, Resident Manager and on-site maintenance team

East Bay Asian Local Development Corporation

Oakland, CA

Commercial Property Administrator

June 2020 – May 2021

- Responsible for seven commercial properties (1 million square feet), including rent collection, preparing budgets, coordinating tenant build-outs, lease review and administration
- Supported the Associate Director with marketing and leasing, project management and financial management using Yardi Voyager, AirCRE, and SignNow

JWilliams

Oakland, CA

Assistant Property Manager

September 2019 – May 2020

- Leased apartments and maintained resident functions by using Yardi Voyager
- Managed resident files, including rent collection, lease preparation, reviewed rent rolls, tracked lease expirations, accepted service requests, created work orders, processed rental applications, move-ins, move-outs, waitlist administration, vendor invoicing, and resolved resident issues

Charles Schwab & Co.

San Francisco, CA

Financial Consultant Partner

November 2014 – October 2018

- Created and presented financial plans, portfolio reviews and investment recommendations
- Managed operational client paperwork including processing complex financial transactions
- Earned maximum bonus award every year based on sales and client relationship management skills

Fidelity Investments

Walnut Creek, CA

Regional Relationship Manager

January 2014 – November 2014

- Ranked #1 nationwide for increasing engagement level and revenues for 10 regional offices
- Strengthened relationships with high-net-worth clients (\$1 million+ in investible assets)
- Generated new business opportunities for Account Executives in San Francisco Bay Area

Morgan Stanley

Honolulu, HI

Financial Advisor

May 2012 – January 2014

- Ranked in the top 20% in nationwide cohort for assets under management
- Conducted discovery interviews with C-level executives to understand their financial goals
- Delivered sales presentations to companies with over \$1 million in investible assets

EDUCATION & CREDENTIALS

- California Property and Casualty Insurance License #0E35018
- Association Management Specialist (AMS), Community Association Institute
- Certified Manager of Community Associations (CMCA), Community Association Institute
- Certified Community Association Manager (CCAM), California Association of Community Managers
- California Real Estate Salesperson License DRE #02150532
- Certified Occupancy Specialist (COS), National Center for Housing Management
- Tax Credit Specialist (TCS), National Center for Housing Management
- Master of Science in Marketing (High Honors), Golden Gate University, San Francisco, CA
- Bachelor of Arts in English (minor in Journalism), Indiana University, Bloomington, IN