

# Valerie A. Lee, M.S.



[www.valeriealee.com](http://www.valeriealee.com)

<http://www.linkedin.com/in/valeriealee>

## 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.

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## PROFESSIONAL EXPERIENCE

### Community Housing Development Corporation (CHDC)

Richmond, CA

Asset Manager

June 2024 – Present

- Assess financial performance, prepare and monitor budgets to corporate benchmarks, and monitor portfolio operational performance relative to long term strategic plan
- Monitor project performance relative to proforma, update limited partner buyout criteria and incorporate into long-term plan
- Plan limited partnership buyout and negotiate sources of funds to facilitate buyouts
- Develop strategies for financial restructuring and amend regulatory agreements
- Ensure long-term sustainability of new affordable housing developments
- Develop and monitor project cash flow projections, reserve accounts, and capital plans
- Assist in developing new affiliate corporations and analyze terms of partnership agreements
- Initiate plans for refinancing and rehabilitation to ensure long-term viability of the projects

### Habitat for Humanity Greater San Francisco (HGSF)

San Francisco, CA

Community Associations Manager

January 2022 – June 2024

- 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 created reports for 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

**EDUCATION & CREDENTIALS**

- California Notary Public Commission #2482101
- California Property and Casualty Insurance License #0E35018
- California Real Estate Salesperson License DRE #02150532
- Association Management Specialist (AMS), Community Association Institute
- Certified Community Association Manager (CCAM), California Association of Community Managers
- 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