

REGISTRATION INFORMATION

**SOARING TO
NEW HEIGHTS**



2019 CONFERENCE
OCTOBER 10-12, 2019
HILTON COSTA MESA



**CALIFORNIA
ESCROW**

ASSOCIATION

EST. 1956

GENERAL INFORMATION

LOCATION

This year's conference will be held at the Hilton Costa Mesa.

Hilton Costa Mesa

3050 Bristol Street, Costa Mesa, CA 92626
800.445.8667 – phone
https://secure3.hilton.com/en_US/hi/reservation/book.htm?execution=e1s1

CEA Guest Room Rate – \$165 for single/double occupancy. Please make your hotel reservations by **Monday, September 9, 2019** to ensure availability and rate.

GENERAL INFORMATION

Please register online or complete the registration form included in this brochure and return it with your payment. Please note that registrations postmarked by September 22nd will receive an early bird discount. Please note the following items:

Confirmation of Registration – You will receive an e-mail confirming receipt of your registration.

Fees – All fees must accompany your registration. Registration deadlines are listed on page 5.

Cancellation – All cancellations must be made in writing. Cancellations received on or before September 13, 2019 will receive a full refund LESS a \$50 processing fee. No refunds will be granted after September 13th.

ESCROW EXPO

Come see the latest in services and products to help make your job easier plus visit fun lifestyle vendors who will help you get a jump start on your holiday gift giving. See page 7 of this brochure for a list of exhibitors (at time of publication). Be sure to enjoy a breather at the Expo during the Conference – your relaxation spot for networking and visiting the exhibitors.

NEW MEMBER SPECIAL

Non-members may attend Conference at the member rate by joining now for 2020. To get the new member special rate, please submit your registration and membership application together.

CEA 2020 PRESIDENT DIANE BOUDREAU-TSCHETTER INSTALLATION LUNCHEON

This year's luncheon on Saturday will feature award presentations for outstanding achievement in several areas. The 2020 Board of Directors will also be installed. Be sure and join us to welcome our new president and hear what she has planned for CEA in 2020.

COCKTAIL RECEPTION

Join your fellow conventioners and visit with your exhibitor friends immediately following the education session on Friday, October 11th for cocktails, hors d'oeuvres, and networking!

PROFESSIONAL DESIGNATION CREDITS

PD Holders, this is the last year of the PD Cycle. By December 31 2019 you must have 48 CEU's for CEO and CESO, and 28 CEU's for CET. You can earn up to 11.75 CEU's at this year's conference. As a PD Holder you also receive a discount on the registration fee. Note: a PD exam will be held on Sunday, October 13th. Separate application and fees required.

Please refer to the CEA website for details:
www.ceaescrow.org/#pagePD

SPONSORSHIP AND EXHIBIT OPPORTUNITIES

There are many opportunities available for companies to sponsor and to exhibit at this year's conference. For information contact CEA Headquarters at cea@camgmt.com or 916.239.4075. You can also download the forms from www.ceaescrow.org

PHOTO/VIDEO DISCLAIMER

By registering for and attending this conference, you agree that your image may be taken during the conference and used at any time, without further notification, for printed materials, websites, social media and other marketing purposes.

EXHIBITOR DISCLAIMER

By registering for and attending this conference, you agree that your contact information may be provided to exhibitors for a one-time use in providing you information regarding their products/services. You may opt out of sharing your information when you register.

MORE INFORMATION

California Escrow Association

2520 Venture Oaks Way, Suite 150
Sacramento, CA 95833
916.239.4075 – phone | 916.924.7323 – fax
www.ceaescrow.org | cea@camgmt.com



CONFERENCE SCHEDULE

11.75 PD Credits Available
All events will be held at the Hilton Costa Mesa

THURSDAY, OCTOBER 10, 2019

8:15 am – 4:30 pm **Notary Class** *(Separate registration required.)*
4:00 pm – 6:00 pm **Registration Open**

FRIDAY, OCTOBER 11, 2019

7:30 am – 4:30 pm **Registration Open**
7:30 am – 8:30 am **Continental Breakfast in the Expo**
7:30 am – 4:00 pm **Escrow Expo Open**
8:30 am – 8:45 am **President's Welcome**
8:45 am – 9:45 am **SESSION** (1.0 PD credits)

① **Trending Financial Crimes**

Sergeant Luna and Vol. Investigator Navarro, from the Los Angeles County Sheriff Department's Fraud and Cyber Crimes Bureau, will share valuable insight into the bureau's activities and responsibilities. Learn the dos and don'ts of managing transaction participants correctly – and you won't want to miss critical information on the Top Seven real estate fraud schemes that could make an appearance on your desk!

*Jacqueline Luna, L.A. County Sheriff Department
Ed Navarro, Action Escrow*

9:45 am – 10:00 am **Expo Break**

10:00 am – 11:30 am **SESSION** (1.5 PD credits)

② **Regulator RESPA Perspectives Sponsored by Umpque Bank**

How does your regulator interpret and enforce compliance among its licensees? Will you need to adjust your practice when a career change places you under different licensing? Take part in this rare opportunity to participate in a conversation with all three California escrow regulators – DBO, DOI, and DRE – and build confidence in your understanding of practice guidelines.

*Eugene Kalinsky, DOI
Paul Liang, DBO
Daniel Sandri, DRE*



FRIDAY, OCTOBER 11, 2019 (cont'd)

11:30 am – 1:00 pm **KEYNOTE LUNCHEON** (0.5 PD credits)

Soar, Soaring, Soared: novel thoughts on spreading your wings. USA Today and Amazon best-selling author, Rebecca Forster, is ready to talk about finding your personal best from launch to landing and everything in between. She'll share her unique perspective on how to look at opportunities and challenges through the eyes of a storyteller.

Rebecca Forster, Author

1:00 pm – 1:15 pm **Expo Break**

1:15 pm – 2:30 pm **SESSION** (1.25 PD credits)

③ **The New Face of Real Estate Lending**

Are you still experiencing inconsistent settlement directives in the age of TRID? Four years into the implementation of the current national standard, the effects of unanticipated compliance challenges and their associated evolving protocols impact the lending community in ways we do not see. Moderator Nancy Silberberg will lead a panel discussion with representatives of predominant mortgage lenders to elevate our understanding of the challenges faced on both sides of the loan closing. Our own David Shean has also agreed to join in the session to bring us up to date on the accelerating progress of the Uniform Closing Instruction.

*Sally Freudenberg, Wells Fargo Bank
Nancy Silberberg, Altus Escrow, Inc.
David Shean, CSE0, CEI, Escrow Essentials
Carmella Snytsheuevel, IMPAC
Plus other lending world invitees to be announced*

2:30 pm – 2:45 pm **Expo Break**

2:45 pm – 3:45 pm **SESSION** (1.0 PD credits)

④ **FIRPTA Withholding From the Source**

Have you attempted to reach an IRS agent by telephone recently? If you reached someone, how much information and guidance were you able to obtain? 2019 Conference offers a unique opportunity to acquire FIRPTA intel direct from our federal taxing authority. Have your questions ready!

Ursula Gee, IRS

3:45 pm – 4:00 pm **Expo Break**

4:00 pm – 5:00 pm **SESSION** (1.0 PD credits)

⑤ **Housing Forecast**

Steven Thomas is renowned for his on-target evaluation and expectations of the housing market. Be sure to attend this session to keep yourself up to date on current housing market conditions, and gain insight into market trends anticipated through the end of this year and into 2020.

Steven Thomas, Reports on Housing

5:00 pm – 6:00 pm **Cocktail Hour**

CONFERENCE SCHEDULE

11.75 PD Credits Available
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SATURDAY, OCTOBER 12, 2019

- 7:30 am – 4:30 pm **Registration Open**
- 7:30 am – 3:15 pm **Escrow Expo Open**
- 7:30 am – 8:30 am **Continental Breakfast in the Expo**
- 8:30 am – 8:45 am **AEA Update** (0.25 PD credits)
Heather will update us on what is happening in the American Escrow Association. AEA is proud of the national presence AEA continues to provide its members. The American Escrow Association is committed to working proactively on behalf of all settlement agents throughout the country by building awareness of the important role we play in the settlement process and by addressing the common issues that affect the entire settlement industry, no matter what particular settlement practice you may be engaged in.
Heather Wyant, 2019-2020 AEA President
- 8:45 am – 10:15 am **SESSION** (1.50 PD credits)
⑥ **Legislative Update**
Our legislative advocates will bring us updates on the latest legislation passed, those being pushed and those being pushed back on. Always a lively discussion, as well as informative.
Michael D. Belote, Esq., California Advocates, Inc.
- 10:15 am – 10:30 am **Expo Break**
- 10:30 am – 11:45 am **CONCURRENT SESSIONS** (1.25 PD credits)
⑦ **Tax Update**
Are you concerned that your withholding procedures might leave you exposed? How do the rules for IRS and FTB compare? How should you manage the conversation with the Seller, Buyer and CPA safely and effectively? Join tax expert Michael Haas as he explains the most recently updated features of the tax code and highlights the areas of regulation where closing agents are most concerned. Michael's knowledge and real world experiences will surely inform your escrow practice decisions regarding taxing agency protocols.
Michael Haas, Morton Alan Haas & Company
- ⑦ **BREAKOUT: Maximizing Efficiency Through Outlook**
A great session for novice practitioners and veterans alike! Discover ways to streamline your workflow through tools you didn't know you had.
Anthony Bourg, Bank of Hope
- 11:45 am – 1:15 pm **Lunch**
Annual Business Meeting, Awards, and Installation.
- 1:15 pm – 1:45 pm **Expo Break**

SATURDAY, OCTOBER 12, 2019 (cont'd)

- 1:45 pm – 2:45 pm **SESSION** (1.0 PD credit)
⑧ **Mechanics of the Blockchain RE Transaction**
Get up to speed on smart contracts and the new age of transaction platforms from the first company to accomplish a Real Estate closing using blockchain technology. Learn how markets are evolving as a result of the growing influence of Millennials and Generation Z and their proclivity for new technologies. What other homebuying trends can we expect, and how will new technologies affect our role as settlement agents? Discover the future that is already upon us!
Konstantinos Gakis, Propy
- 2:45 pm – 3:00 pm **Final Expo Break**
- 3:00 pm – 4:30 pm **CONCURRENT SESSIONS** (1.5 PD credits)
⑨ **Risky Areas of Escrow Practice**
Fortify your defenses with expert guidance from three prominent industry attorneys, who will teach us about the pitfalls that can arise through even the most watchful and meticulous settlement procedures. Learn to recognize red flags old and new, skillfully determine points of exposure, and head off the challenges before they become actual liabilities. Are you living on the edge of imminent peril, or do your practices provide reliable shelter? Check in with our panel for an important procedural maintenance check.
Jennifer Felten, Esq., RELAW, APC
Laura Lowe, Old Republic Title
Rose Pothier, Esq., Pothier & Associates
- ⑨ **BREAKOUT: Interpreting a Preliminary Report & Closing Statement**
Build a strong foundation! This session is designed for those who are new to escrow but will also provide a helpful refresher for the seasoned professional. Look at the Preliminary Report with fresh eyes and consider the clear history that is told by a well-executed Final Settlement Statement. These traditional forms are the building blocks of expertly performed service, and our celebrated speakers will use plain language to cover them section-by-section with practiced perspective and invaluable insight.
Robert Elliott, North American Title
Michele Kibbe, CEO, Pacific Homeland Escrow
- 4:30 pm **Final Drawings**
- 4:30 pm **Conference Adjourns**

SUNDAY, OCTOBER 13, 2019

- 8:30 am – 1:00 pm **P.D. Exam** (Separate registration required.)



Notary Public Education & Exam

FOR NEW AND RENEWING NOTARIES

COURSE COST *\$89.99 *Special Pricing for members of California Escrow Association. \$99.99 for non-members.

STATE EXAM FOLLOWING CLASS - HIGHEST PASSING RATES

It is recommended that you take the State Exam at least 6-12 months before the expiration to avoid a break in your commission. Processing of commissions can take several months.

Schedule

- 8:15 : Registration
- 8:30 AM - 11:30 AM: Class
- 11:30 PM - 12:15 PM : Lunch
- 12:15 PM - 3:00 PM : Class
- 3:15 PM : Register & Pass Exam

What's Included

- * Practice exam questions, etc.
- * Notary regulations & duties
- * Document preparation & recording
- * When to refuse to notarize
- * Responsibilities, duties, etc.
- * Tips, tricks & money making ideas

Register Early

When you register for the class you will receive a link to read the State Notary Handbook and to study 138 sample exam questions that will prepare you to pass.

This extensive course covers all the new regulations.

State Test Same Day

- * State officials give the test.
- * Bring Photo ID (Driver's license, etc.) and a \$40 check payable to "Secretary of State."
- * Bring two #2 pencils for exam and one 2" x 2" color photo of yourself.

What's Covered

We'll not only discuss the latest laws and regulations, you'll also review the fundamentals of Jurats, Affidavits, the Journal, fingerprinting, forms of identification, sworn statements, and more.

Duane Gomer Seminars

Thursday, October 10th

Hilton Hotel

Bristol 1 Room

3050 Bristol Street

Costa Mesa, CA 92626

Time: 8:30 am to 5:00 pm

Check In: 8:15 am

Duane Gomer Seminars

23312 Madero, Suite J
Mission Viejo, CA 92691

Phone: 949-457-8930

E-mail: duane.g@duanegomer.com

www.duanegomer.com

Monday to Friday 9 am to 5 pm



REGISTER:

Call: (800) 439-4909
or visit us online at
www.NotariesUnlimited.com

This seminar is being presented by Duane Gomer Inc., an approved Notary Education Vendor with the Secretary of State.

They have a history of outstanding passing rates at a reasonable price and are the recommended course provider for the California Escrow Association.

REGISTRATION FORM

California Escrow Association 64TH Annual Education Conference • October 10-12, 2019 • Costa Mesa, CA

Register Online at www.ceaescrow.org!
 CEA MEMBERS: Be sure to sign-in to get the member rate!

 click here

TO PAY BY CHECK, FILL OUT THIS FORM AND MAIL TO THE ADDRESS BELOW:
 CEA HEADQUARTERS • 2520 VENTURE OAKS WAY, SUITE 150 • SACRAMENTO, CA 95833
 (916) 239-4075 • FAX: (916) 924-7323 • www.ceaescrow.org • cea@camgmt.com
DO NOT E-MAIL COMPLETED FORMS OR CREDIT CARD INFORMATION; PLEASE FAX OR MAIL OR REGISTER ONLINE

Please register early; seating is limited.

PLEASE TYPE OR PRINT — *For additional registrations, please duplicate this form*

Last Name: _____ First Name: _____
 Title: _____ Company, if applicable: _____
 Address: _____ Home Address Business Address
 City: _____ State: _____ Zip: _____
 Telephone: _____ Cellphone: _____
 Fax: _____ E-Mail: _____
 Regional Associations: _____
 Please list any special dietary/physical needs: _____

IMPORTANT: Please initial here if you DO NOT want your name and address provided to our vendors/exhibitors/sponsors: _____

	EARLY – on or before 9/22/19		REGULAR – after 9/22/19 & onsite		
	Member	Non-Member	Member	Non-Member	
<input type="checkbox"/> Full Registration	\$365	\$575	\$450	\$660	\$ _____
<input type="checkbox"/> Single Day <input type="radio"/> Friday <input type="radio"/> Saturday	\$230	\$440	\$315	\$500	\$ _____
<input type="checkbox"/> Full Registration, PD Holder**	\$340	N/A	\$425	N/A	\$ _____
GRAND TOTAL DUE					\$ _____

I plan to attend the following events. Note, this is so that we have an estimated attendance count. You are not committed to attend your selection, nor does CEA guarantee your space.

Notary Class Friday Lunch Friday Cocktail Hour Saturday Lunch

**Please check all that apply: CEO CEI CLEO CBSS CSEO CMHS CSLEO CET

CANCELLATION POLICY

Cancellations must be submitted in writing to CEA Headquarters. Cancellations received on or before September 13, 2019 will receive a full refund, less a \$50 per person processing fee. No refund will be granted after September 13, 2019.

THANK YOU SPONSORS

(at the time of publication)

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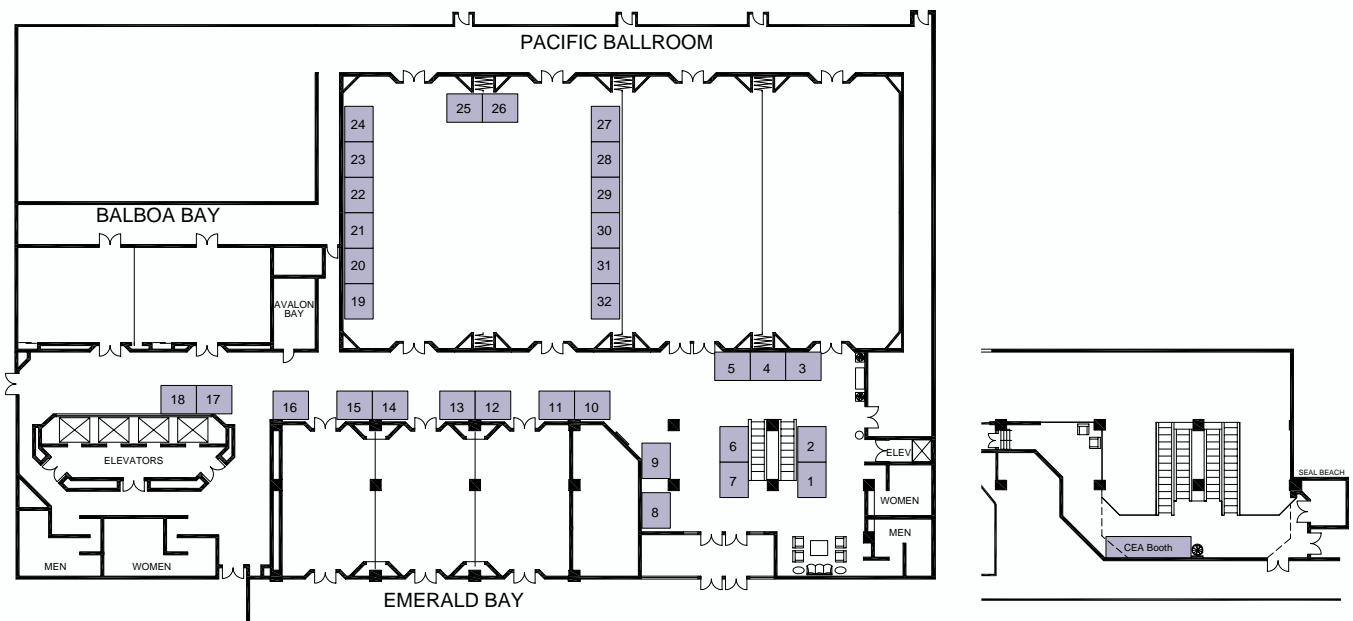
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RELAW, APC

THANK YOU EXHIBITORS

(at the time of publication)

Bancserv
BBS Notary Services
California Franchise Tax Board - Real Estate Withholding
Central Signing Service, Inc.
CoreLogic
Exchange Resources, Inc.
Exeter 1031 Exchange Services, LLC
First American NHD
Hershorin & Henry, LLP
ImageX Document Scanning
J.R. Olsen Bonds & Insurance Brokers, Inc.
MyNHD, Inc.
Notaries Express, LLC
RBJ Software, Inc.
Settlement Management Solutions
SunDoc Filings



MEMBERSHIP APPLICATION 2020

Membership Categories

Individual Active Membership (\$300) – Individual Active members shall be a person currently in the escrow settlement profession with a Regional membership or a person formerly in the escrow settlement profession, with a Regional membership, who currently holds a CEA Professional Designation. This category shall allow for full voting privileges at the Regional level, in the California Escrow Association and the American Escrow Association.

Individual Support Staff Membership (\$100) – An Individual Support Staff Member shall be a person that participates in the escrow or settlement process as a secretary, assistant, or any other position that is clerical and/or entry level. This category of membership is not available to an escrow officer or any other person in a management or supervisory position. This category of membership provides for no voting rights in the California Escrow Association and no membership in the American Escrow Association. This category allows for Regional membership.

Individual Associate Membership (\$300) – An Individual Associate membership shall be available to those individuals in allied fields not engaged in the practice of escrow. This category also allows for Regional membership and membership in the American Escrow Association, but has no voting rights in the California Escrow Association.

State Only Membership – Individual Active (\$300) – A State Individual Active membership shall be available to those persons currently in the escrow settlement profession without Regional membership, or a person formerly in the escrow settlement profession without Regional membership who currently holds a CEA Professional Designation. This category allows for full voting privileges in the California Escrow Association but no voting rights in the American Escrow Association, as defined in the Bylaws of the American Escrow Association.

State Membership – Individual Support Staff (\$100) – A State Individual Support Staff Member shall be a person that participates in the escrow or settlement process as a secretary, assistant, or any other position that is clerical and/or entry level. This category of membership is not available to an escrow officer or any other person in a management or supervisory position. This category of membership provides for no voting rights in the California Escrow Association and no membership in the American Escrow Association. This category allows for no Regional membership.

Inactive Membership (\$125) – Inactive members shall be those past Individual Active members or State Individual Active members who are no longer engaged in their profession, either permanently or temporarily. An Inactive member shall not be entitled to vote or hold office, but may serve on any special committee or committees. An Individual Active member or State Individual Active member shall be considered inactive only subsequent to a period of one (1) year after such member has ceased to meet requirements of an Individual Active or State Individual Active member. At such time an Inactive member is deemed to subsequently meet requirements for an Individual Active membership or State Individual Active membership, they may be reinstated.

New Renewal

Please allow up to 3 weeks for new member processing.

Individual Membership

Membership Category: Individual Active Individual Support Staff Individual Associate Inactive
 State Individual Active State Individual Support Staff

Name: _____ Title: _____ Referred by: _____

For categories other than State, please choose a primary regional membership using the CEA map.

If no region, please select State. Region: _____ State (no region)

Employment Category (check one): TC – Title Company S/L/B – Savings & Loan or Bank
 BE – Broker Escrow LE – Licensed Escrow OT – Other

I would like to opt out of appearing on the CEA Web site.

Membership is based on a calendar year, on an individual basis, and is non-transferable.

Business Address

Company Name _____
 Address _____
 City / State / Zip _____
 Phone _____ Fax _____
 E-mail _____

Home Address

Address _____
 City / State / Zip _____
 Phone _____ Fax _____
 Mobile Phone _____

For mailing and online membership directory purposes, please use my (check one): Business Address Home Address

In making this application, I certify that the above is true and correct and I agree to abide by the Bylaws of the above named Regional Association and the California Escrow Association and the American Escrow Association, if appropriate.

Signature _____ Date _____

Contributions or gifts (including membership dues) to the CEA are not tax deductible as charitable contributions. Pursuant to the Federal Revenue Reconciliation Act of 1993, association members may not deduct as ordinary and necessary business expenses, that portion of association

dues dedicated to direct lobbying activities. Based upon the calculation required by law, 22% (Intern) or 30% (all others) of the State Dues payment only should be treated as nondeductible by CEA members. Please consult your tax advisor for tax credit/deduction information.

Payment (do not e-mail credit card information)

Amount: _____ Enclosed is check # _____ (Payable to California Escrow Association) Company Personal
 AMEX MasterCard Visa Last 4 digits of card: _____ Name on Card: _____
 Billing Address: _____ Signature: _____

Full Credit Card# _____ Exp: _____ CVV#: _____

Return completed form and payment by mail or fax to: California Escrow Association, 2520 Venture Oaks Way, Suite 150 • Sacramento, CA 95833 • (916) 924-7323 – fax
For more information, contact us at: (916) 239-4075 – phone • (916) 924-7323 – fax • www.caeescrow.org