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**Members of the
American
Escrow Association**

Dear CEA Conference Attendee:

Welcome to the California Escrow Association's 62nd Annual Conference, "Escrow is Our Super Power!" Attending the CEA Conference is the best way to stay informed and be a part of a wonderful network of escrow professionals.

Your attendance speaks volumes about your dedication to your profession. I am so proud to be in this industry with people who care so much. We want to give our clients the best experience and, like most Super Heroes, we want to make the world a better place!

Together we are most influential as we keep in mind our goal to promote one another as excellent escrow practitioners. We do this by continuing our education and making sure our members are well informed and have a network of co-members to call upon for additional expertise and advice.

However, that is not to say that we don't need to stay vigilantly on the watch for legislative challenges both State and Federal that are ever looming. Having Mike Belote and Lexi Howard as our "Advocates," keeps CEA's interests in front of our CA lawmakers. It is truly remarkable how quickly CEA and our other industry friends are willing to mobilize and work together when an issue faces us.

When you see Juliana Tu, Whitney Adkins and Susan Paul, and their fabulous committee, please thank them for all their hard work this year for bringing us a lively and professional conference. It is quite an undertaking to put on a conference of this magnitude. Also, don't forget CEA Headquarters, Jennifer Blevins, Stephanie Schoen, John Berkowitz and all the other staff at CEA. We couldn't do this without all of them!

Be sure to visit our supporting exhibitors and explore the activities in the Expo! Please remember to thank them for their continued support of CEA and utilize their services when you go back to your desk.

Your Board of Directors continues to explore new ways to make your organization the best it can be. CEA is your organization! We will continue to strive to meet your needs, and we welcome your involvement, ideas and constructive comments. I encourage each of you to bring one new member to CEA – to make our organization stronger.

I am proud to have been your President this year – it is indeed an honor, and I appreciate all your support. Thank you for attending and enjoy the conference!

Sincerely,

Michele Kibbe, CEO
CEA 2017 President

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GENERAL INFORMATION

LOCATION

Hilton Costa Mesa
3050 Bristol Street
Costa Mesa, CA 92626
714.540.7000

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.

THE PANTHEON

Be sure to enjoy a breather at The Pantheon, located in the Hilton Costa Mesa Ballroom, during the Conference – your relaxation spot for networking and visiting the exhibitors.

PROFESSIONAL DESIGNATION CREDITS

PD holders can earn up to 12.5 continuing education credits.

DISCOUNTED PARKING AT THE HILTON COSTA MESA

CEA Conference attendees receive discounted parking of \$10 per day and \$15 for overnight for self parking. Attendees should show their name badge or advise the attendant that they are attending the CEA Conference to receive the discounted rate.

ESCROW AWARDS LUNCHEON

Saturday's lunch will feature award presentations for outstanding achievement in the following areas: Regional Newsletter Award, Regional Community Spirit Award, Rose Pothier Scholarship Awards, Director Awards, and the Lifetime Achievement Award. Be sure to join us to celebrate your fellow escrow practitioners!

COCKTAIL RECEPTION AT THE PANTHEON

Join your fellow conventioners and visit with your exhibitor friends immediately following the education sessions on Friday, October 13th for cocktails, hors d'oeuvres, karaoke contest, door prize drawings, and fun! Plus a scavenger hunt and escrow trivia!

CONFERENCE RAFFLE DRAWINGS

Be sure to buy your tickets – great prizes throughout conference.

SOCIAL MEDIA

Use the following hashtags to post your conference photos for a chance to be published in the *CEA News*: #CEASuperPower #CEAConference #EscrowBam.

NO REGRETS MEETING POLICY

If you attend this year's conference as a paid full registrant, member or non-member, haven't attended a conference within the past three years and you are not completely satisfied with the meeting, you will receive a 100% refund of your registration fee. Please contact Jennifer Blevins at jennifer@caladmanagement.com regarding this policy. Thank you.

This year's Conference logo and The Fraudster rendition created by "Alice In Escrowland" author, Sandra Coopersmith.



CONFERENCE SCHEDULE

12.5 PD Credits Available

All events will be held at the Hilton Costa Mesa.

THURSDAY, OCTOBER 12, 2017

8:15 am – 4:30 pm **Notary Class** (Separate registration required.)
Bristol 3

12:00 noon **CEA 2017 Mark Coniglio Memorial Golf Tournament**
Bella Collina San Clemente
200 Avenida La Pata • San Clemente, CA 92673
Transportation on own. Check in by 10:30 am.
(Separate registration required.)

4:00 pm – 6:00 pm **Registration Open**
Lobby Level

FRIDAY, OCTOBER 13, 2017

7:30 am – 6:00 pm **Registration Open**
Lobby Level

7:30 am – 8:30 am **Continental Breakfast at The Pantheon!**
Pacific 3-4

7:30 am – 4:00 pm **Escrow Expo Open at The Pantheon!**
B2 Level & Pacific 3-4

8:30 am – 8:45 am **Welcome! by the CEA President**
Pacific 1-2

8:45 am – 9:00 am **SESSION (.25 PD credit)**
Pacific 1-2 ① **Uniform Closing Initiative**
Sponsored by BBS Notary

What's going on in the world of the Uniform Closing Initiative (UCI)? Presented by "The World Builders" – **Nancy Silberberg**, President of Escrow Institute of California and **Dave Shean**, CEO, AEA Government Affairs Committee Member. Will this finally become a Reality? Will this make our work Easier? Status of this work in progress to be briefly presented by our very own Nancy and Dave, members of the Steering Committee put together by MISMO, a subsidiary of MBA, to address this issue. Can we Hold Our Breath (HOB) without asphyxiating?

Nancy Silberberg, *Altus Escrow*
David Shean, *Escrow Essentials*
"The World Builders"

FRIDAY, OCTOBER 13, 2017 (cont'd)

9:00 am – 10:00 am **SESSION (1.0 PD credit)**
Pacific 1-2 ② **State of our Great State of California**

Conference 2017 is proud to present **Senator Mike Morrell** of California's 23rd Senate District (San Bernardino and Riverside counties). Senator Morrell is a member of the State Senate Insurance, Banking, and Financial Institutions Committee, a friend of small businesses and, as a past owner of real estate and mortgage companies, he possesses an in-depth knowledge of the ins and outs of the title, real estate and mortgage industry. He knows our joys and feels our frustrations! He is our Hero in Sacramento!

Senator Mike Morrell, *23rd Senate District*

10:00 am – 10:15 am **Expo Break! See you at The Pantheon!**

10:15 am – 11:30 am **SESSION (1.25 PD credits)**
Pacific 1-2 ③ **The Electronic Menace? All Things "E" (Besides Escrow)**

All things "E" and how it affects our E-screw! Presented by "The Shield" a.k.a. **Steve Garcia, Esq.** E-mail, E-Signatures, E-File Storage, E-Transfer, E-Media: How to Avoid Getting Zapped in an E-World. In the mold of Clark Kent, Steve Garcia is a mild-mannered lawyer, mediator, and public servant who dedicates himself to educating and shielding the Escrow Industry from those forces which seek to do it harm. With humor and poignancy, he seeks to bring wisdom, knowledge, and new perspectives to those in Escrow to help them in their never-ending battle to serve their clients throughout the land.

Steve Garcia, Esq., *Garcia Legal, APC*
"The Shield"

11:30 am – 12:45 pm **OPENING LUNCH (1.25 PD credits)**
Catalina Ballroom



We proudly introduce **Sally French Tyler**, our Super Power "Oracle," our Friday Keynote luncheon speaker who will share key-note insights on our role in the real estate world as well as predictions for the future. Sally French Tyler is President of the National Commercial Services Division of First American Title Insurance Company. Her decades in the industry have given her a unique perspective on business strategy, recruitment, training, customer development, underwriting, escrow, closing and more. Connecting her past experience with predictions for the future, Sally will take the industry full circle in this captivating event.

Sally French Tyler, *First American Title*
"The Oracle"

12:45 pm – 1:00 pm **Expo Break! Let's meet at The Pantheon!**

CONFERENCE SCHEDULE

12.5 PD Credits Available

All events will be held at the Hilton Costa Mesa.

FRIDAY, OCTOBER 13, 2017 (cont'd)

- 1:00 pm – 2:15 pm
Pacific 1-2 **SESSION (1.25 PD credits)**
④ **Technology and You. It's Complicated.**
Sponsored by Hershoren & Henry LLP
We live in an ever-changing world of technology. Artificial Intelligence? Check. Robotics? Check. Nanotechnology? Check. **"The TechMaster" – Aaron Norris** of The Norris Group – is our superhero. Let The Master show you it's NOT complicated and how Virtual Reality is becoming The Reality!
Aaron Norris, The Norris Group
"The TechMaster"
- 2:15 pm – 2:30 pm **Expo Break! Going to The Pantheon!**
- 2:30 pm – 3:30 pm
Pacific 1-2 **SESSION (1.0 PD credit)**
⑤ **1099 Changes – Why Us?**
Sponsored by Exchange Resources
What is the IRS and FTB up to and what fallout are we looking at when the hammer starts swinging down? **Michael Haas, CPA** is **"The Reckoner"** and he will hold off those Weapons of Mass Destruction (WMD) with answers and a lot of "do's and don't's." Worry not, but only if you join us at Conference!
Michael Haas, CPA
"The Reckoner"
- 3:30 pm – 3:45 pm **Expo Break! Heading to The Pantheon!**
- 3:45 pm – 5:00 pm
Pacific 1-2 **SESSION (1.25 PD credits)**
⑥ **Money Laundering – How Does This Affect Your Closing?**
Sponsored by Evergreen Note Servicing
FinCEN is monitoring this through their "Geographical Targeting Order (GTO)" and we have to use our super powers of observance to be aware. What do we watch for? What is the history and the issues with this new regulation? **Kevin Bell**, Research and Enforcement Specialist, Enforcement Division will show us how they guard against the problems of money laundering through our transactions!
Kevin Bell, FinCEN Research and Enforcement Specialist
- 5:00 pm – 9:00 pm
Pacific 1-2 **The Super Powers are Gathering at The Pantheon!**
• Karaoke
• Scavenger Hunt
• Escrow Trivia
• Cocktails & Appetizers

SATURDAY, OCTOBER 14, 2017

- 7:30 am – 4:30 pm
Lobby Level **Registration Open**
- 7:30 am – 8:30 am
Pacific 3-4 **Have Some Continental Breakfast at The Pantheon!**
Sponsored by J.R. Olsen Bonds & Insurance Brokers, Inc.
- 7:30 am – 3:00 pm
B2 Level & Pacific 3-4 **Escrow Expo Open at the Pantheon!**
- 8:30 am – 8:45 am
Pacific 1-2 **A Warm Welcome to the American Escrow Association**
Sponsored by Evergreen Note Servicing
Conference 2017 welcomes **Sheryl Oldham**, SASIP, 2017-2018 President of the American Escrow Association and our "Master of the Escrow Universe" Super Hero. Sheryl will provide us with a brief summary of what issues AEA is fighting for our industry this upcoming year. Go, Sheryl! Go AEA!
Sheryl Oldham, SASIP President
"Master of the Escrow Universe"
- 8:45 am – 10:00 am
Pacific 1-2 **SESSION (1.25 PD credits)**
⑦ **Fighting the Fraudsters – Who's Winning the Tug-of-War?**
Sponsored by BBS Notary
It's us against those Fraudsters! Helping us fight those Fraudsters who want our Trust Accounts will be our **"Fraud Avengers,"** a.k.a. **Matthew Davis, Esq.** and **Michael Sohn.** Attorney and public servant, Matt and Michael throw up a shield with their Super Hero knowledge and expertise and push back against those who seek to disappear with the consumers' money. How do they avenge them? What can they teach us about the form these Fraudsters take? Come and learn about the what, the how, and the who we need to watch for.
Matthew Davis, Esq., Davis & Davis Law Group, APC
Michael Sohn, FBI Supervisory Special Agent
"The Fraud Avengers"



CONFERENCE SCHEDULE

12.5 PD Credits Available

All events will be held at the Hilton Costa Mesa.

SATURDAY, OCTOBER 14, 2017 (cont'd)

10:00 am – 10:15 am **Expo Break! Meet you at The Pantheon!**

10:15 am – 11:30 am **SESSION** (1.25 PD credits)
Pacific 1-2 ③ **Claims! Prevention! Resolution!**

A presentation by the "Claims Buster" a.k.a. Lisa Tyler, Senior Vice President, National Escrow Administrator of the Fidelity Family of Companies. Lisa has traveled 519,546 miles by planes, trains and automobiles, stayed in 374 hotel rooms, rented 183 cars, wore out 5 laptops, 4 Blackberrys, 3 iPhones and two training coordinators, was deposed 38 times, trained 14,882 employees and published 120 issues of Fraud Insights. She is our HERO!

**Lisa Tyler, Fidelity National Title
"The Claims Buster"**

11:30 am – 1:00 pm
Catalina Ballroom

Lunch
Annual Business Meeting, Awards, and Installation.

1:00 pm – 1:15 pm **Expo Break! The Pantheon here we come!**

1:15 pm – 2:30 pm **SESSION** (1.25 PD credits)
Pacific 1-2 ④ **Tales from the Front Lines – Fighting the Fight. Every. Single. Day.**
Sponsored by BBS Notary

What horror stories are lurking at our desks? What deep, convoluted scenarios are we faced with that should be brought to light and smashed away? Join The Escrow League – Jennifer Felten, Rose Pothier and Michele Kibbe – in their quest to bring light to the dark and set the escrow world on its right axis of power!

Jennifer Felten, Esq., RELAW, APC
Michele Kibbe, CEO, Pacific Homeland Escrow
Rose Pothier, Esq., Pothier & Associates
"The Escrow League"

SATURDAY, OCTOBER 14, 2017 (cont'd)

2:30 pm – 3:00 pm **Final Expo Break! Take a breather at The Pantheon! Exhibitor and Passport Drawings**
Pacific 3-4

3:00 pm – 4:30 pm **SESSION** (1.5 PD credits)
Pacific 1-2 ⑩ **Guarding the Escrow Galaxy**
Sponsored by City National Bank

Who are guarding the doors to our escrow world? Who keeps us up-to-date on what's happening in those hallowed halls of government? None other than Michael Belote, Esq. and Lexi Howard, Esq. – our "Advocates" and our Guardians of the Escrow Galaxy! Their understanding of the legislative process, their in-depth analysis of those SB's and AB's that will slam us in the head, and their humor in presenting this subject makes this the most popular session of Conference every year. You miss, you lose!

Michael D. Belote, Esq., California Advocates, Inc.
Lexi Purich Howard, Esq., California Advocates, Inc.
"The Advocates"

4:30 pm
Pacific 1-2

Final Drawings

4:30 pm

Conference Adjourns

See you next year on October 11-13, 2018 at the Anaheim Marriott.

SUNDAY, OCTOBER 15, 2017

8:00 am – 4:00 pm **P.D. Exam** (Separate registration required.)
Laguna Beach 1-2 (B1 Level)



HILTON COSTA MESA





62ND Annual Education Conference October 12-14, 2017

Hilton Costa Mesa

Note, course materials are available on the CEA website for download.

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The written and verbal information contained herein and in electronic form provided for conference sessions is only intended to serve this audience as a guide in the various transactions to which the information is applicable.

No representation is made as to the legal validity of the information or the adequacy of it in any specific transaction. The information contained in this material and at the sessions should be used only after consultation with the management of your company and legal counsel.

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THANK YOU EXHIBITORS

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Bancserv

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FPS Financial Processing Systems

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RECOGNIZING OUR MEMBERS & REGIONS

Since its incorporation, the California Escrow Association has been dedicated to providing educational opportunities for its

members through lectures, panels, workshops, seminars and meetings on both the state and local levels. One of CEA's primary goals is to foster and

improve services to the public by setting standards and procedures that elevate the status of the escrow industry as a whole.

CHARLES P. CONNER MEMORIAL PERPETUAL EDUCATION AWARD

Up-to-date information on new legislation, new regulations and changing interpretations in the field of escrow is essential to the escrow practitioner. A thorough knowledge of basic escrow practices and procedures and the opportunity for continuing education in more sophisticated practices are of equal importance. Recognizing the need for implementation of these education goals on the regional level, in 1970, the California Escrow Association introduced the Perpetual Education Trophy. In 2005, this award was named in honor of CEA Past President and Educator, Charles P. Conner.

The trophy is awarded annually at the CEA Conference to the regional association that offered the most outstanding education program during a specific time frame.

Credit is given to the workshops, seminars, panels and meetings produced by the association. Participation of members as speakers, panelists or moderators earn points for their region. Regions also receive credit for members who are students or teachers in a California Community College escrow program, as well as members who qualify for a CEA Professional Designation, instructor credential, or Education Achievement Award.

The smaller regions compete on a level playing field with the larger ones, as scoring is based on the percentage of members attending or participating, rather than on the actual number of members.

PAST WINNERS ARE:

- 1971 Los Angeles
- 1972 Orange County
- 1973 San Fernando Valley
- 1974 Orange County
- 1975 San Diego County
- 1976 Orange County
- 1977 San Diego County
- 1978 San Diego County
- 1979 Orange County
- 1980 Riverside County
- 1981 Riverside County
- 1982 Tri-County
- 1983 Tri-County
- 1984 Orange County
- 1985 Alameda County
- 1986 N. San Diego Co.
- 1987 Orange County
- 1988 Orange County
- 1989 Orange County
- 1990 Orange County
- 1991 Santa Clara Valley
- 1992 Bay Area
- 1993 Bay Area
- 1994 Santa Clara Valley
- 1995 Santa Clara Valley
- 1996 Orange County
- 1997 North State
- 1998 Santa Clara Valley
- 2000 Orange County
- 2001 Escrow Assoc. of San Gabriel Valley
- 2002 Ventura County
- 2003 Ventura County
- 2004 Escrow Assoc. of San Gabriel Valley
- 2005 Escrow Assoc. of San Gabriel Valley
- 2006 Escrow Assoc. of San Gabriel Valley
- 2007 Escrow Assoc. of San Gabriel Valley
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- 2011 Escrow Assoc. of San Gabriel Valley
- 2012 Escrow Assoc. of San Gabriel Valley
- 2013 Escrow Assoc. of San Gabriel Valley
- 2014 Escrow Assoc. of San Gabriel Valley
- 2015 (Award is being restructured.)

PERPETUAL NEWSLETTER AWARD

Keeping in touch, keeping up-to-date, keeping informed. This award was created to acknowledge regional associations for communicating to their members via newsletter. Past recipients include:

- 1995 Orange County
- 1996 Ventura County and Riverside
- 1997 Riverside County Escrow Association
- 1998 Escrow Assoc. of San Gabriel Valley
- 1999 Ventura County
- 2000 Escrow Assoc. of San Gabriel Valley
- 2001 Escrow Assoc. of San Gabriel Valley
- 2002 Ventura County
- 2003 Ventura County
- 2004 Orange County
- 2005 Escrow Assoc. of San Gabriel Valley
- 2006 Escrow Assoc. of San Gabriel Valley
- 2007 Escrow Assoc. of San Gabriel Valley
- 2008 Santa Clarita Valley
- 2009 Escrow Assoc. of San Gabriel Valley
- 2010 Escrow Assoc. of San Gabriel Valley
- 2011 Escrow Assoc. of San Gabriel Valley
- 2012 Escrow Assoc. of San Gabriel Valley
- 2013 Escrow Assoc. of San Gabriel Valley
- 2014 Escrow Assoc. of San Gabriel Valley
- 2015 Escrow Assoc. of San Gabriel Valley
- 2016 Riverside County Escrow Association

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RECOGNIZING OUR MEMBERS & REGIONS

OLGA MITCHELL ROOKIE DIRECTOR OF THE YEAR

Awarded to a current first time member of the CEA Board of Directors for board meeting attendance, participation, enthusiasm and committee involvement.

1990	Anna Burden
1992	Irene Cole
1993	Daisy Howell
1995	Dawn Kinney
1996	Louise Hewitt
1997	Sonja Wilkin
1998	Laurie Psenner
1999	Margarita Billings
2000	Fran Butler
2001	Pete Carey
2002	Laura Moore
2003	Starr Wolf
2004	Kathryn Sabens
2005	Ann Smith
2006	Robert Elmore
2007	Denise Guthrie
2008	Donna Matteucci
2009	Scott Hunt
2010	Genia Engelstad
2011	Cindy Ioimo
2012	Lory Renberg Brown
2013	Sandra Olson
2014	Reba Starnes
2015	Dan Cowan
2016	Mickey Vandenberg

COMMITTEE CHAIR OF THE YEAR

Awarded to a current member of the CEA Board of Directors who serves as the chairperson of a committee. Criteria includes participation, rapport and the realization of the committee's goals for the year.

1993	Kim Yarnell/Joan Kuykendall
1995	Judy Cook
1996	Stacey Stowe
1997	Debbie O'Keefe
1998	Sandy Rose
1999	William McCloskey
2000	Irene Genders/Cyndi Ondrusek
2001	William McCloskey
2002	William McCloskey
2003	Alisa Brilman
2004	Lexi Howard
2005	Tina Hunter
2006	David Shean
2007	Juliana Tu
2008	Judy Cook
2009	Tracy White
2010	Anita Rubeck
2011	Phyllis Yanagihara
2012	Cindy Ioimo
2013	Debbi Faber
2014	Sammy Simpson
2015	Sharon Strahlendorf
2016	Vanessa James

LIFETIME ACHIEVEMENT AWARD

To recognize and acknowledge, with special honor, an individual that has served as a CEA officer or director and has given above and beyond the call of duty to CEA:

2005	Kim Dawson
2006	David Shean
2007	Sandy Rose
2008	Joyce Cujak
2009	Not Awarded
2010	Not Awarded
2011	Tina Hunter
2012	Bill Vance
2013	Kathy Lozano
2014	Not Awarded
2015	Not Awarded
2016	Scott Hunt (posthumously)

COMMUNITY SPIRIT AWARD

Recognizing the region that has reached out to the community with a special project. Past recipients include:

2003	Ventura County
2004	East Bay
2005	East Bay
2006	San Gabriel
2007	East Bay
2008	East Bay
2009	Alameda
2010	East Bay Escrow Association
2011	East Bay Escrow Association & Escrow Assoc. of San Gabriel Valley
2012	East Bay Escrow Association
2013	East Bay Escrow Association
2014	Riverside County Escrow Association
2015	East Bay Escrow Association & Escrow Assoc. of San Gabriel Valley
2016	Riverside County Escrow Association

Please use this sheet to make your reference notes for the sessions you attend. You may also use this form to make notes to be used for the online evaluation you will receive via e-mail following the conference.

Day/Date/Time: _____

Session Number/Speakers: _____

My Reference Notes: _____

My Evaluation Notes: _____

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