



California Escrow Association 48th Annual Education Conference



**October 2-5, 2003
Fairmont Hotel
San Jose, CA**

Registration Brochure

October 2-5, 2003
San Jose, Fairmont Hotel

California Escrow Association 2003 Annual Conference



General Information

Location/Hotel Information

We're heading North to San Jose and the beautiful Fairmont Hotel! As the grand host of the Silicon Valley, San Jose is a warm, sophisticated city that makes visitors feel right at home. With its pleasant weather, walkable streets and an invigorating atmosphere offering both culture and entertainment, you'll enjoy your stay in this unique and varied California center.

The **Fairmont Hotel San Jose** enters an elite category of properties that uphold the Mobil Travel Guide Four-Star standards of excellence. The Fairmont's classic architecture and gracious, elegant interior contrasts with the fast moving city outside. Rooms and suites are appointed with every amenity the discerning traveler expects – attendees will be pampered in luxury. The Fairmont has 24 hour room service, numerous restaurants, a beautiful lobby lounge, swimming pool and sundeck, and health club with spa services.

The Fairmont is located downtown with many nearby restaurants and cultural venues. Please visit the Fairmont's web site at www.fairmont.com for more details. Additionally, visit www.sanjose.org for city information. Fairmont Hotel, 170 South Market Street, San Jose, CA.

For its conference attendees, CEA has a discounted room rate of \$139.00 for single/double occupancy plus applicable taxes. Additional persons are \$25.00 per person. Please call the Fairmont directly at 1-800-346-5550 or 408.998.1900 no later than **September 5th** to secure your room and rate.

Travel

The Fairmont Hotel is located 10 minutes from the San Jose Airport. Transportation is available via taxi. The Fairmont Hotel offers self and valet parking.

Southwest Airlines is offering a 10% discount on most of its already low fares for travel to and from the California Escrow Association's 48th Annual Education Conference. Call (or have your professional travel agent call) the Southwest Airlines Group and Meeting Desk at 1-800-433-5368, Monday-Friday, 8:00 a.m. – 5:00 p.m. and Saturday, 9:30 a.m. – 3:30 p.m. by no later than 5 days prior to the first date of travel and refer to I.D. Code **K0237** to take advantage of this offer. Call right away as fares are subject to terms and availability. Southwest Airlines can also offer you car rental information.

Professional Designation Credits

P.D. holders can earn up to 17.25 continuing education credits and receive a discounted registration fee.

Conference Sponsorship/Exhibit Opportunities

There are several opportunities available for companies to sponsor items and to exhibit at this year's conference. For information about the sponsorships/exhibiting opportunities that are available, contact CEA Headquarters at cea@camgmt.com.

General Information

Please complete the registration form included in this brochure and return it with your payment. Please note that registrations postmarked by September 1st will receive an early bird discount of \$50.00. Please note the following items:

Confirmation of Registration – Please include a copy of your registration form, and a self-addressed, stamped envelope with your registration. You will receive your confirmation immediately upon receipt of your registration fees.

Fees – All fees must accompany your registration. Registration deadlines include the postmark date.

Cancellation – All cancellations must be made in writing. Cancellations received on or before September 19, 2003 will receive a full refund LESS a \$50 processing fee. No refunds will be granted after September 19th.

Company Discounts – Companies sending three or more employees to the conference may enjoy a 10% discount off of the registration fee. Please note, registration forms for each employee must be sent together with one company check or credit card for the total amount due. No exceptions.

Barcode Scanner Beta Test – During this year's conference, CEA will be conducting a beta test of a barcode scanner system. Each attendee will have a barcode printed on their name badge. There will be a scanner set up outside one of the meeting rooms. Please help us to test the system by scanning in and out of each session you attend in that particular meeting room. We will also be testing the system during the luncheons. The barcode system will be used in the future for tracking P.D. Credits and statistical data. We appreciate your cooperation, participation and patience as we conduct this beta test. Please note that it is not mandatory to scan in. P.D. holders will still be required to complete manual 501(c) forms.

California Escrow Association
530 Bercut Drive, Suite G
Sacramento, CA 95814
(916) 325-0600 / (916) 325-9990 - fax
cea@camgmt.com / www.ceaescrow.org

October 2-5, 2003
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Special Events & Local Attractions

Thursday, October 2, 2003

CEA Golf Tournament

1:00 pm Shotgun Start
Santa Clara Golf
& Tennis Club
5155 Stars & Stripes Dr.
Santa Clara, CA 95054
Separate registration
form and fees required.



Saturday, October 4, 2003

"Living the American Dream"

7:00 pm Fairmont Hotel
Come join us for an evening of "Living the American Dream – Red, White & Blue" with music, dinner, dancing and lots of fun. Come celebrate with your friends and acknowledge the outgoing Executive Board of 2003 and welcome in the 2004 Executive Board and President, Margarita Billings.



Sunday, October 5, 2003

"Going Topless"

Brunch with Guest Speaker
Alyce Coryn-Selby
ABC, CBS, USA Cable, Psychology Today, Daily Journal of Commerce, This Week, and Successful Meetings have all featured her practical and innovative solutions. Alyce Coryn-Selby has been named to Britain's Foremost Women of the 20th Century and 8 Who's Who. "Best speaker we have had... already requests for repeat engagement!"
—National Association of Professional Sales



Local Attractions

CEA...Heading North!

San Jose will serve as the destination for this year's 48th Annual Education Conference and we invite all of you to participate in lots of education and lots of fun!



To start, San Jose is the largest city in Northern California and offers a variety of performing and cultural arts. Enjoy the repertory and musical theaters, ballet, opera, and fine art. You'll find museums that transport you to ancient Egypt and 19th century San Jose as well as show you the technology of tomorrow.

If sports is your game, San Jose has six professional teams (including the National Hockey League's San Jose Sharks), college events (San Jose State University), and more. And don't forget about the one-of-a-kind attractions like the beautiful-but-bizarre Winchester Mystery House, exciting theme parks, outlet and fashion shopping, local wineries, parks and gardens, and sophisticated downtown nightlife! Of course, there are plenty of gourmet restaurants, too.

Plus many, many more. For more downtown restaurant ideas and city information, visit www.sanjose.org.



The Tech Museum of Innovation

Located within walking distance of the Fairmont Hotel, the San Jose Tech Museum of Innovation is an educational resource established to engage people of all ages and backgrounds in exploring and experiencing technologies affecting their lives, and to inspire the young to become innovators in the technologies of the future. Visit www.thetech.org.



San Jose Symphony Association

100 North Almaden Avenue
San Jose, CA 95110
p:(408) 287-7383 / f:(408) 286-6391
info@sanjosesymphony.org
www.sanjosesymphony.org
Signature, SuperPops! Familiar Classics and Family Concert Series, Season, September - June.



CEA Grand Prize Raffle Drawing

Enter the drawing for a chance to win \$1,000 cash.

Tickets are available prior to conference through your regional association and during conference at the hospitality desk. The drawing will be held during Saturday's luncheon – winner need not be present.



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Schedule of Classes & Events

THURSDAY, OCTOBER 2, 2003

- 1:00 pm Golf Tournament**
Santa Clara Golf & Tennis Club
5155 Stars & Stripes Dr., Santa Clara, CA 95054
(Separate registration form required.)
- 3:30 pm – 6:30 pm Conference Registration Open**
Fairmont Hotel, 2nd Floor

Friday, October 3, 2003

- 7:00 am – 5:30 pm Registration Open**
- 7:00 am – 5:30 pm Escrow Expo Open**
- 8:00 am – 9:00 am Opening Ceremonies**
(1 P.D. Credit)
Join your fellow delegates for a special ceremony to kick-off this year's conference.
"You Can Cry, or You Can Create"
Meet the creator of *Alice in Escrowland*
Sandra Coopersmith, Artist
- 9:00 am – 9:15 am Expo Break**
- 9:15 am – 10:45 am Concurrent Sessions**
(1.5 P.D. Credits)

- #1 Commercial Contracts & A.I.R. Forms**
Learn the procedures for filling out the A.I.R. Forms and Commercial Contracts.
Fran Butler, CSEO, CEI, First American Title Company
- #2 Human Resource Management**
Personnel Management – Hiring and Terminations
Nancy van Voris, Red Lion Hotels
- #3 Notary Exam Workshop (For Existing Notaries Only)**
This is a "tune-up" for existing notaries who are taking the renewal exam.
Pat Meyer, Certified Notary Instructor
- 10:45 am – 11:00 am Expo Break**
- 11:00 am – 12:15 pm Concurrent Sessions**
(1.25 P.D. Credits)
- #4 Notary Exam**
Notary testing for new and renewal applicants.
(Separate forms and fees required at time of exam – first come, first serve, space is limited – register in advance, on-site registration is not available for this exam.)
- #5 Mobile Home Panel**
Learn the "ins and outs" of handling mobile home escrows.
Dave Cook, California Department of Housing
J.C. Strutzel, Express Escrow

- #6 National Notary Association – "Protecting America"**
Our speaker will expose the great threat of identity theft and the role of notaries.
- 12:15 pm – 12:30 pm Expo Break**
- 12:30 pm – 2:00 pm Luncheon with Guest Speaker,**
Mark Sachau, President, California Land Title Association
(1 P.D. Credit)
- 2:00 pm – 2:15 pm Expo Break**
- 2:15 pm – 3:45 pm Concurrent Sessions**
(1.5 P.D. Credits)
- #7 "A Girl Needs Cash"**
Financial planning and managing debt towards a secure future.
Joan Perry, Author and President of Take Charge Financial
- #8 Commercial Escrow Forms & Practices**
Complex commercial escrow situations.
Fran Butler, CSEO, CEI, First American Title Company
- #9 Property Records Industry Task Force**
A national look at standard setting efforts in the property records industry.
Mark Monacelli, St. Louis County Recorder, Minnesota – Member of the Executive Board of the Property Records Industry Task Force
- 3:45 pm – 4:00 pm Expo Break**
- 4:00 pm – 5:30 pm Concurrent Sessions**
(1.5 P.D. Credits)
- #10 1031 Exchanges**
Background in exchanges and the increased activity since AB 2065.
Michael Yesk, IPX 1031
- #11 Common Sense Escrow**
Common sense escrow – how to stay out of trouble.
Rose Pothier, Esq., Pothier & Associates

Evening On Own Explore San Jose and Enjoy Great Restaurants

Saturday, October 4, 2003

- 7:00 am – 5:00 pm Registration Open**
- 7:00 am – 4:00 pm Escrow Expo Open**
- 7:00 am – 8:00 am Continental Breakfast in Expo Area**
- 8:00 am – 10:00 am Concurrent Sessions**
(2 P.D. Credits)
- #12 CEA Professional Designation Workshop**
A primer to taking the CEO and/or CSEO professional designation certification exam.
Linda Bentson, CSEO, CEI, Old Republic Title Company
Kathy Lozano, CSEO, American Title Company

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Schedule of Classes & Events

Saturday, October 4, 2003 – continued

#13 Escrow Technician Workshop 1
Working with your EO – escrow structure and building the file.
Irene Genders, CSEO, CEI, First American Title Insurance Company
Nancy Stalter, CSEO, BSS, MHS, CEI, Chicago Title Company

#14 Legislative Update and AEA National Affairs
The State legislative update and an update on the national scene.
Mike Belote, Esq., California Advocates, Inc.
Neil Takeuchi, President, American Escrow Association

10:00 am – 10:15 am Expo Break

10:15 am – 11:45 am Concurrent Sessions
(1.5 P.D. Credits)

#15 Escrow Technician Workshop II
Lenders Instructions – Auditing – Recording Documents
Irene Genders, CSEO, CEI, First American Title Insurance Company
Nancy Stalter, CSEO, BSS, MHS, CEI, Chicago Title Company

#16 Electronic Recording Panel – California
Contra Costa, Trinity, San Mateo Counties
Darrough Foreslund, Trinity County Recorder
Steve Weir, Contra Costa County Clerk/Recorder

#17 CEA Website – How To Use The Web
The new CEA website – a quick understanding of using the web effectively.
Kim Dawson, CSEO, CEI, Lawyers Title

11:45 am – 12:00 noon Expo Break

12:00 noon – 1:30 pm Luncheon
Join your fellow colleagues for lunch and camaraderie, including a program of presentations, awards, the grand prize raffle drawing and a chance to win great raffle prizes!

1:30 pm – 1:45 pm Expo Break

1:45 pm – 3:15 pm Concurrent Sessions
(1.5 P.D. Credits)

#18 “Success in Life”
How to handle high volume while avoiding escrow burnout.
Dana Gordon, President of Dasan International

#19 Outlook & E-Mail Applications
Using Microsoft Outlook effectively and successful e-mailing tips.
Terry Thomason, Vice President, Stewart Title Co. of California, Riverside

#20 Taxation in Real Estate
Cal-Firpta – AB 2065 – Withholding Requirements
Michael Haas, Morton Alan Haas & Co.

3:15 pm – 3:30 pm Final Expo Break
Be sure to check the reader board to see if you won any exhibitor prizes. Also, remember to turn in your completed escrow expo passport no later than 3:20 pm

3:30 pm – 5:00 pm Concurrent Sessions
(1.5 P.D. Credits)

#21 “Catch 22 Syndrome”
Escrow coordination to avoid common pitfalls.
Jan Oates, Fidelity National Financial

#22 Property Insurance in California – Toxic Mold
Hear the latest on the CLUE Report System and the toxic mold situation.
Dean Fletcher, Mission Counties Insurance

#23 Microsoft Word & Downloading Documents
Downloading lenders documents and loan packages.
Terry Thomason, Vice President, Stewart Title Co. of California, Riverside

#24 Notes and Deeds of Trust
Proper documentation for drawing notes and deeds of trust.
Sandy Rose, CSEO, CEI, Old Republic Title Company

7:00 pm “Living the American Dream”
Come join us for an evening of “Living the American Dream – Red, White & Blue” with music, installation, dinner, dancing and lots of fun at the Fairmont Hotel.

Sunday, October 5, 2003

8:30 am – 12:00 noon Registration

9:00 am – 10:30 am

#25 Professional Designation Exam
Testing for CEA’s Professional Designations (Separate application, eligibility and fees required in advance – on-site registration not allowed.) Schedule a full day for this exam.

#26 Escrow Troubleshooting
(1.5 P.D. Credits)
Keeping out of trouble and fixing problem files.
Laura Lowe, Commonwealth Land Title

10:30 am – 11:00 am Break – Hotel Check-Out

11:00 am – 12:30 pm (1.5 P.D. Credits)

#27 “Going Topless”
Brunch and Guest Speaker, Alyce Coryn-Selby
Alyce Coryn-Selby has been named to Britain’s Foremost Women of the 20th Century and 8 Who’s Who.

Current CEA Exhibitors & Sponsors

Check out these exhibitors at the 2003 Escrow Expo:

(At time of publication.)

- AdvantageWare, Inc. •
- Asset Preservation •
- Baskets By Design •
- Bay Area Sign-Ups •
- California Overnight •
- CEA Hospitality •
- CEA Marketing •
- Chicago Deferred Exchange Corporation •
- Chicago Title •
- Crystal Persuasions.com •
- Diversified Exchange Corporation •
- Exchange Resources, Inc. •
- Hallmark Associates Insurance Service •
- J.R. Olsen Bonds & Insurance Brokers, Inc. •
- Jewels by Park Lane •
- LANI •
- LGS Reports Inc. •
- MishMash Originals •
- Mission Counties Insurance Agency, Inc. •
- NSBN, LLP •
- Pacific Corporate & Title Services •
- RBJ Computer Systems, Inc. •
- SMS •
- Software Sourcery Systems, Inc. •
- Vital Signing •

CEA would like to thank this year's sponsors:

(At time of publication.)

- Baskets By Design •
- City National Bank •
- RBJ Computer Systems, Inc. •
- SMS •
- Union Bank of California •



**CALIFORNIA ESCROW ASSOCIATION
2003 GOLF TOURNAMENT REGISTRATION**

We are excited to present our 2003 annual golf tournament to be played at the SANTA CLARA GOLF AND TENNIS CLUB, 5155 Stars & Stripes Dr. Santa Clara, CA 95054. Please make your plans now to join us!

DATE: Thurs. Oct. 2, 2003

TIME: 1:00 pm Shotgun Start

PLACE: SANTA CLARA GOLF AND TENNIS CLUB

COST: \$90.00 PER PLAYER

DETAILS: Scramble Tournament-cost includes green fees/cart, range balls, box lunch, prizes for longest drive, closest to pin, putting contest, post-tournament awards and raffle.

Please complete this form with your name and/or your foursome:

PLAYER _____ **COMPANY** _____
PLAYER _____ **COMPANY** _____
PLAYER _____ **COMPANY** _____
PLAYER _____ **COMPANY** _____

RENTAL CLUBS AVAILABLE: \$15 for standard and \$30 for premium (payable at golf course) ___ Please check here if you need to rent clubs, and note how many and which type: _____

CONTACT PHONE # _____

EMAIL ADDRESS: _____

COMPANY _____

CHECK ENCLOSED IN THE AMOUNT OF \$ _____

Make check payable to California Escrow Association

DEADLINE TO REGISTER: Sept. 22, 2003

RETURN TO:

MARK CONIGLIO • CITY NATIONAL BANK • 4275 EXECUTIVE SQ. #750

LA JOLLA, CA 92037 • Ph: 858-642-4980 / Fax: 858-642-4965

E-mail: mark.coniglio@cnb.com



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Sacramento, CA 95814

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48th Annual Conference Registration Materials

