CALIFORNIA ESCROW ASSOCIATION
66TH ANNUAL CONFERENCE
an Adventure
Register Now!
October 8-9, 2021 Hilton Costa Mesa

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

CEA Guest Room Rate – $165 for single/double occupancy. **Please make your hotel reservations by Monday, September 13, 2021 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 October 1st will receive an early bird discount. Please note the following items:

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 October 4, 2021 will receive a full refund LESS a $50 processing fee. No refunds will be granted after October 4th.

Escrow Expo

We've been stuck in the doldrums far too long! It's time to dive back into our world of camaraderie, adventure, and enlightenment. Meet up with old buddies and discover a whole passel of new friends. And don't be alarmed by all the grinning faces popping up everywhere.

The secrets are revealed on page 7 of this brochure – a list of exhibitors (at time of publication). So don't be late for this very important date.

CEA 2022 President Susan Paul Installation Luncheon

This year's luncheon on Saturday will feature award presentations for outstanding achievement in several areas. The 2022 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 2022.

Cocktail Reception

Join your fellow conventioneers and visit with your exhibitor friends immediately following the education session on Friday, October 8th for cocktails, hors d'oeuvres, and networking!

Professional Designation Credits

PD Holders, this is the second year of the three-year PD Cycle. By December 31 2022 you must have 48 CEU's for CEO and CESO, and 28 CEU's for CET. You can earn up to 11.25 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 10th. 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. 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

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

Thursday, October 7, 2021

8:15 am - 3:15 pm **Notary Class**
See page 4 for details.
Separate registration required:
www.NotariesUnlimited.com

4:00 pm - 6:00 pm **Registration Open**

Friday, October 8, 2021

7:30 am - 4:30 pm **Registration Open**

7:30 am - 4:00 pm **Escrow Expo Open**

7:30 am - 8:30 am **Continental Breakfast in the Expo**

8:45 am - 9:00 am **President's Welcome**

9:00 am - 9:45 am **SESSION 1** (0.75 PD credits)
AEA & CEA Updates
CEA President, Tricia Vagt and AEA President, Donna Inman will provide State and National information on what is transpiring within our industry.
Donna Inman, CEI, CSEO
Tricia Vagt, CEI, CEO, CMHS, CSEO

9:45 am - 10:00 am **Break**

10:00 am - 11:15 am **SESSION 2** (1.5 PD credits)
593 Tax Report / 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, CPA, Haas and Dawe

11:15 am - 11:30 am **Break**

11:30 am - 12:45 pm **Lunch** (1.25 PD credits)

12:45 pm - 1:00 pm **Break**

Friday, October 8, 2021 (cont'd)

1:00 pm - 2:30 pm **SESSION 3** (1.25 PD credits)
In Conversation - RON* Notary Session
Come learn about remote online notary. Where is your liability and are you truly ready?
Jessie Bullis, BBS Notary
Nancy Silberberg, Altus Escrow Inc.
Rick Triola, Notary Cam

2:30 pm - 2:50 pm **Break**

2:50 pm - 4:20 pm **SESSION 4** (1.5 PD credits)
In Conversation - What Is Happening With Your Recordings?
Discussion on Electronic Records and the various platforms, SB2. What documents are being recorded electronically?
Juliana Tu, CEO, CSEO, CEI, CBSS
Jaime Pailma, LA County Recorder
Randy Paslay, CLTA Forms & Practice Committee Member

4:30 pm - 6:00 pm **Evening Reception**

Conference Schedule

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

Saturday, October 9, 2021

7:30 am - 4:30 pm **Registration Open**

7:30 am - 4:00 pm **Escrow Expo Open**

7:30 am - 8:30 am **Continental Breakfast in the Expo**

8:30 am - 10:00 am **SESSION 5** (1.5 PD credits)
C.A.R. Contract - Part I
Dave Shean, CSEO, CEI
Matthew Davis
Neil Kalin, Esq., C.A.R.

8:30 am - 10:00 am **BOOTCAMP 1** (1.5 PD credits)
Escrow Basics, Excel and Elevate
An overview of what is escrow and understanding the escrow profession. The session will cover phone and customer service etiquette and what you need to be aware of when providing information. Rose Pothier will share her stories and cases on what happens when we disclose information not to be provided and what can happen in different situations.
Debbi Faber, CEI, CBSS, CMHS, CSEO
Rose Pothier, Esq., Pothier & Associates

10:00 am - 10:15 am **Break**

10:15 am - 11:30 am **SESSION 6** (1.25 PD credits)
New Real Estate Contract / Litigation / Scams - Part II
This In Conversation will be a recording from Neil Kalin on the latest update of the C.A.R. Contract and the in person panel will talk about the changes in the C.A.R. contract and how it will affect us in our escrow process, which will then lead us in to any litigation and scams to watch.
Dave Shean,
Matthew Davis,
Neil Kalin, Esq., C.A.R.

10:15 am - 11:30 am **BOOTCAMP 2** (1.25 PD credits)
Skill Up - Getting Started and Reading the Prelim
The first part of the session focuses on setting up the escrow file and reviewing the purchase contract. We then move onto reviewing the Preliminary Title Report and understanding the title side and why it is required.
Colleen Graves, CEI, CSEO

11:45 am - 1:15 pm **Lunch / Annual Business Meeting / Installation**

Saturday, October 9, 2021 (cont'd)

1:15 pm - 1:30 pm **Break**

1:30 pm - 2:30 pm **SESSION 7** (1.00 PD credits)
How to Reduce Your Stress Without Quitting Your Job
You'll find out why it's so important to reduce your stress. You'll also learn some fun and easy ways to lower the stress for yourself and your co-workers and still be amazing at your job.
Jan Cerasaro, CSEO

1:30 pm - 2:30 pm **BOOTCAMP 3** (1.00 PD credits)
Escrow Insight - Understanding Prorations and Loan Documents
This session deals with Escrow Math, as we refer to prorations. We will explain prorations. Understand why and how it is used in escrow and will show how to manually prorate. The second part focuses on loan documents. What to watch for and reviewing the lender's instructions.
Donna Inman, CEI, CSEO
Jennifer Felton, Esq.

2:30 pm - 3:00 pm **Final Break**

3:00 pm - 4:15 pm **SESSION 8** (1.25 PD credits)
Legislative Update
Mike Belote 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.
Mike Belote, Esq., California Advocates, Inc.

3:00 pm - 4:15 pm **BOOTCAMP 4** (1.25 PD credits)
Escrow Success and What Happens Next
What you need to know about closing your escrows, disbursing funds and the end result.
Sharon Strahlendorf, CEI, CEO, CMHS, CSEO
Maria Trangelo, CEI, CSEO

4:15 pm - 4:30 pm **Closing Session / Prizes**

Sunday, October 10, 2021

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

CALIFORNIA ESCROW ASSOCIATION est. 1956

Notary Public Education & Exam

FOR NEW AND RENEWING NOTARIES

COURSE COST $99.99 WHY PAY $159 ELSEWHERE?

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.

Duane Gomer Seminars

Thursday, Oct. 7th

Hilton Hotel

Bristol 1 Rm.

3050 Bristol St.,

Costa Mesa, CA 92626

(800) 439-4909

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

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 Included

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

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

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 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.

REGISTER:

Call: (949) 457-8930 or visit us online at *www.NotariesUnlimited.com*

DUANE GOMER EDUCATION

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 66TH Annual Education Conference
October 8-9, 2021 • Costa Mesa, CA

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

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 10/1/21		REGULAR – after 10/1/21 & onsite		
	Member	Non-Member	Member	Non-Member	
☐ Full Registration	$375	$575	$450	$660	$_____
☐ Single Day ☐Friday ☐Saturday	$230	$440	$315	$500	$_____
☐ Full Registration, PD Holder**	$350	N/A	$425	N/A	$_____
☐ Bootcamp Track	$200	$250	$240	$290	$_____

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.

☐ 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 October 4, 2021 will receive a full refund, less a $50 per person processing fee. No refund will be granted after October 4, 2021.

Thank You Sponsors

First Corporate solutions

Property I.D.® Disclose with Confidence™

BBS Notary Services

Bond Services LLC
Your Bonding Resource Center!

myNHD myNHD.com

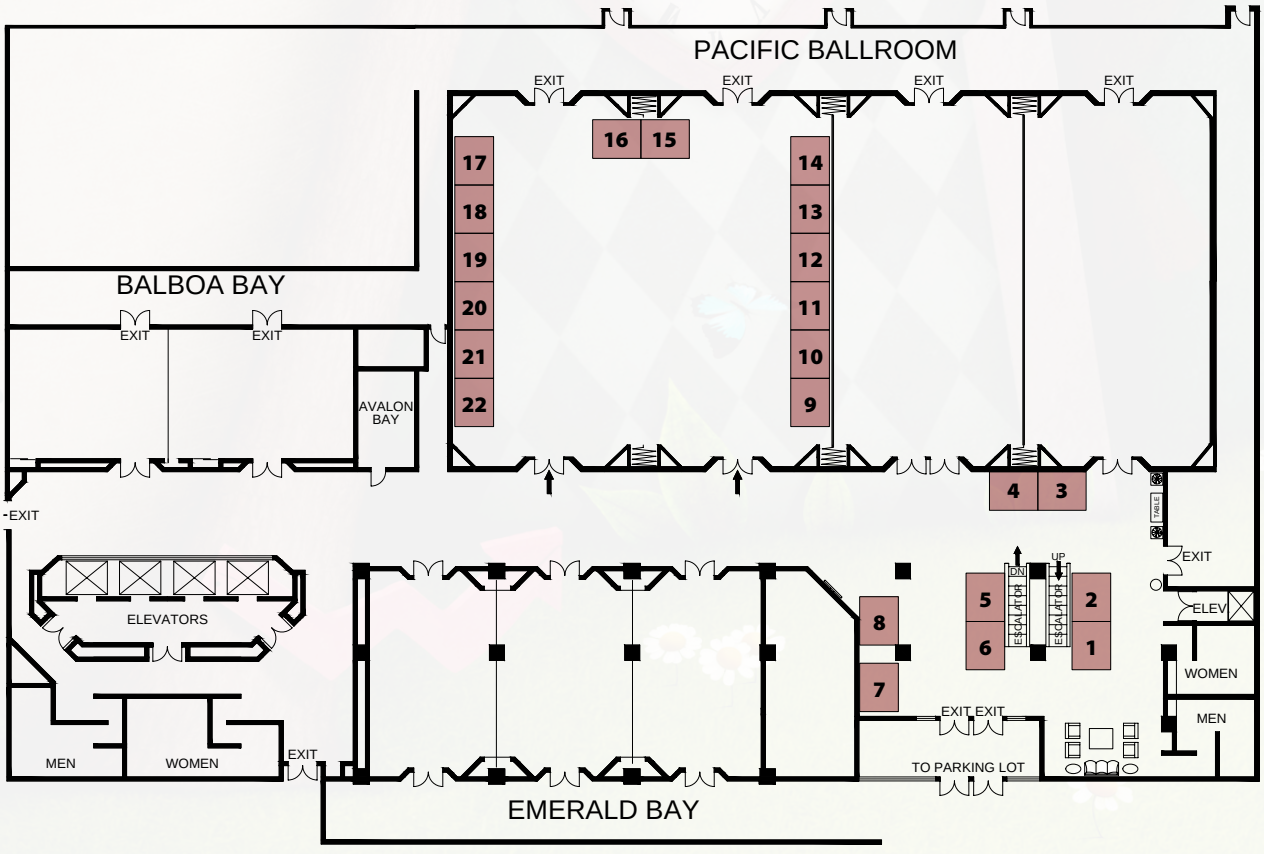
SNAPNHD

Thank You Vendors

(at time of printing)

BBS Notary
Bond Services of California
Exchange Resources, Inc.
First American NHD
FPS Summit
Genie Software
MyNHD, Inc.
Property ID
SnapNHD
Standard Signings, LLC
Sundoc Filings

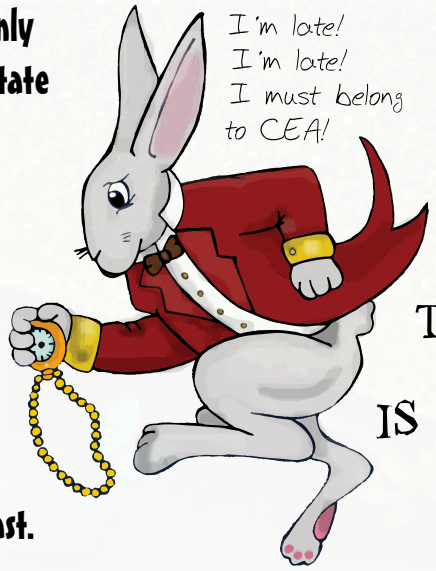
Exhibit Hall



CEA is offering a special one-time only promotional rate of $100 for new State Only Active memberships for 2022.

Sign up today and get the CEA membership for the remainder of 2021 for free!

Offer expires November 30, 2021 and is open to individuals who have not been a member of CEA in the past.



CALIFORNIA ESCROW ASSOCIATION EST. 1956

THE TIME TO BELONG IS NOW!

2022 Membership Application

State Only Membership – Individual Active ($100) – A State Individual Active membership shall be available to those persons currently in the escrow settlement profession and who have not been a member of CEA in the past. No voting privileges.

State Only Membership

Name: _____ Title:_____ Referred by: _____

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

☐ I would like to opt out of having my information included on the CEA website.

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 _____

*E-mail*_____

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.ceaescrow.org*

(rev. 8/21)

CALIFORNIA ESCROW ASSOCIATION EST. 1956

Rose Pothier Education Scholarship

Supported by Pothier & Associates

The Rose Pothier Junior Escrow Officer Educational Scholarship Fund was established in 1994 for the purpose of awarding financial assistance towards attendance at the CEA Annual Educational Conference. Two scholarships of up to $250 each will be awarded to help defray the expenses of conference registration and lodging.

The scholarship is supported by Pothier & Associates, and will enable more junior escrow officers to benefit from the educational programs planned and presented by the California Escrow Association at its Annual Educational Conference.

Name of Applicant: _____

Company Name: _____

Address: _____

Phone: _____ Fax: _____

E-Mail: _____

THE ABOVE APPLICANT STATES THAT THEY:

1) are actively involved in the processing of escrows;
2) are in a junior position, such as an escrow secretary, assistant escrow officer, junior escrow officer or escrow technician. APPLICANT CANNOT BE IN A SUPERVISORY POSITION.
3) have been in the escrow profession for less than FIVE (5) YEARS.

EMPLOYER CONFIRMATION: *(to be completed by the Applicant's Employer)*

1) I state that the above applicant is employed by my company and that said applicant meets the criteria as described above.
2) I feel the applicant is deserving of this Scholarship for the following reason(s):

_____

_____

_____

_____

(please attach a separate sheet if necessary)

By: _____ Title: _____

Print Name: _____ Phone: _____

Please return this form BY THE 27TH OF SEPTEMBER to:

CEA Headquarters
2520 Venture Oaks Way, Suite 150
Sacramento, CA 95833
(916) 239.4075/(916) 924.7323 - Fax
cea@camgmt.com / www.ceaescrow.org