



# TITLE INSURANCE & DOC PREP BASICS: An Introduction to Closing the Deal

HYATT REGENCY HILL COUNTRY RESORT & SPA | SAN ANTONIO | DEC. 6, 2017

Back for a fifth year, this course is designed to address title insurance questions that frequently arise in connection with a closing and are presented to the lawyer representing a party. The speakers will address title insurance due diligence for the client and how to assure the best coverage and rates. Moreover, what if the insured does have a defect in title or an encumbrance – how should it be handled? Finally, this course provides an overview and practice tips for preparation of legal documents to convey title, release encumbrances and cure title issues.

## ► WEDNESDAY, DEC. 6, 2017

9:30 a.m. .... **Registration and Refreshments**

10 a.m. .... **Distinguishing the Title Insurance Transaction and the Real Estate Transaction**

- What is the regulatory framework? What is outside the regulatory framework?

*G. Roland Love, North American Title Company, Dallas*

10:45 a.m. ... **The Commitment**

- How important are the contract and loan requirements? How can you address and possibly resolve exceptions?

*Richard Melamed, Richard Melamed, PLLC, Houston*

11:15 a.m. ... **Endorsements in Texas (Non-Survey)**

- What is an endorsement? Which ones are common? Which ones are important considerations for a commercial deal or a residential transaction? What do they mean?

*Bruce D. Liesman, CAEP, CTIP, National Investors Title Insurance Company, San Antonio*

11:45 a.m. ... **Endorsements in Texas (Survey Issues)**

- Why is a survey important to the title insurance transaction? When is one required? When can a prior survey be used?

*Paul McNutt, Jr., Title Resources Guaranty Company, Dallas*

12:15 p.m. ... **Lunch Presentation: Rate Rules**

- What are the difficult questions or tricky applications? What are the options? What credits are available?

*Janet Minke, CTIP, Alliant National Title Insurance Company, Boyd*

1:30 p.m. .... **Closing Issues**

- Identify closing issues, including ad valorem taxes, good funds, instructions and closing protection letters.

*Charles J. Jacobus, Charter Title Company, Houston*

2 p.m. .... **The Policy**

- What are new coverages? Which exclusions and exceptions are important to the “deal?” What is not covered?

*Charles J. Jacobus, Charter Title Company, Houston*

2:30 p.m. .... **Making and Handling Claims**

- When and how should a claim be tendered? What are the timelines? What are the underwriter’s options? How is a loss determined?

*Steve Streiff, Old Republic National Title Insurance Company, Houston*

3 p.m. .... **Break**

3:15 p.m. .... **Preparing a Deed**

- What type is appropriate? What are the components?

*G. Roland Love, North American Title Company, Dallas*

3:45 p.m. .... **Preparing Releases and Lender Docs**

- What is being released? Are all releases the same? Aspects to watch out for.

*M. Suzanne Frossard, North American Title Company, Fort Worth*

4:15 p.m. .... **Boundary Line Agreements and Easements**

- What’s yours is mine? Good fences make good neighbors! Remember an easement is a limited dominant estate, so think about your purpose, users and the future.

*Celia C. Flowers, Flowers Davis, PLLC and East Texas Title Companies, Tyler*

4:45 p.m. .... **Affidavits of Heirship; Power of Attorney and Resolutions/Authority**

- It’s all about empowerment — when, how and sometimes why.

*Richard Melamed, Richard Melamed, PLLC, Houston*

5:30 p.m. .... **Adjourn and Networking Reception**

**COST \$289/PERSON**

**REGISTER ONLINE**

**RESERVE ROOM**

*(OR use form on next page below)*

## ► CONTINUING EDUCATION

6.5 hours of MCLE, TREC and ESCROW credit available.

## ► LOCATION

Hyatt Regency Hill Country  
9800 Hyatt Resort Drive  
San Antonio, TX 78251  
210.647.1234



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## ▶ MAIN CONTACT

Confirmations will be emailed to registrants approximately five days prior to the seminar. You may also confirm your registration by checking the pre-registration list on the TLTA website. If a confirmation is not received, call TLTA at 512.472.6050.

Main Contact Name \_\_\_\_\_ Company \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## ▶ PARTICIPANT INFO

*Please register the following personnel for the Doc Prep Seminar:*

Attendee #1 Full Name \_\_\_\_\_ Email \_\_\_\_\_

Attendee #2 Full Name \_\_\_\_\_ Email \_\_\_\_\_

Attendee #3 Full Name \_\_\_\_\_ Email \_\_\_\_\_

Attendee #4 Full Name \_\_\_\_\_ Email \_\_\_\_\_

## ▶ REGISTRATION DETAILS

**PROGRAM # GUESTS**

**TOTAL**

Title Insurance & Doc Prep Basics:  
An Introduction to Closing the Deal\* \_\_\_\_\_ x **\$289** = \_\_\_\_\_

*\* Also includes lunch*

## ▶ PAYMENT INFORMATION

Mail with your check made payable to TLTA or fax with credit card payment:  
TLTA | 1717 W. Sixth St., Ste. 120 | Austin, TX 78703 | FAX 512.472.5931

Credit Card Payments (please check one):

**Visa**  **MasterCard**  **Amex**  **Discover**

Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Name on Card \_\_\_\_\_

Signature \_\_\_\_\_

## ▶ CANCELLATION POLICY

The registration fee, less a \$25 cancellation charge, is refundable if notice is received by Nov. 24, 2017. (Emails or Faxes only: [education@tlta.com](mailto:education@tlta.com) or 512.472.5931)

No-shows will not be refunded, however substitutions may be made. Space is limited, so please submit your registration early!

## ▶ NOTES

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