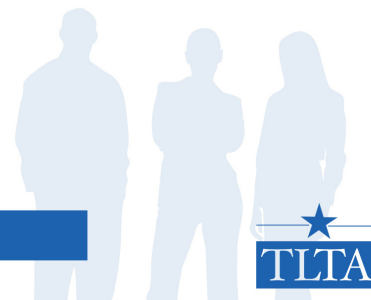


OWNING AND MANAGING A TEXAS TITLE AGENCY

A COMPREHENSIVE PROGRAM FOR PROFESSIONALS PRESENTED BY THE TEXAS LAND TITLE ASSOCIATION



TLTA is pleased to present an UPDATED, live presentation of a unique educational opportunity for new title agency owners, those new to a management position or those in need of a refresher. Presented by outstanding and experienced title industry professionals, this one-of-a-kind program will cover topics such as regulatory compliance, licensing, accounting, other key duties and responsibilities of a title agent and much more.

*** NOTE:** This program is designed to satisfy the requirements of Rule P-28(IV) by the Texas Department of Insurance for management personnel of title agents applying to be licensed.

MONDAY APRIL 8

12:30-1 p.m.Registration

1-2 p.m.UNIT 1

Introduction to Title Insurance and Title Insurance in Texas

Teresa Frost, CTIP, National Investors Title Insurance Company

Lisa Beville, CTIP, Fidelity National Title Group

- What Is Title Insurance?
- Components of the Title Insurance Process
- Title Insurance in Texas – What Is Included in the Premium
- Title Insurance Forms: Commitments, Policies, Endorsements and Binders
- Flow of a Title Insurance Transaction

2-3 p.m.UNIT 2

Title Insurance, Escrow/Settlement and the Regulators: An In-Depth Look

Cass Burton, Burton and Bedell, P.L.L.C.

Denise Smith Holmes, CTIP, Independence Title

- State and Federal Regulatory Bodies – Who's Who
- Important Texas and Federal Statutes and Regulations – Updated Basic Manual of Rules, Rates and Forms, RESPA and More
- Key Regulatory Responsibilities

3:15-4:30 p.m.UNIT 3

Rules and Laws that Affect the Texas Title Agent's Business Model

Teresa Frost, CTIP, National Investors Title Insurance Company

Sini Blacquiere, Fidelity National Title Group

- Steps to Licensing; Steps to Starting a Business
- Title Plants – You Must Have One
- The Underwriter/Agent Relationship
- Duties of Licensed Escrow Officers
- Who Can Receive a Portion of a Title Insurance Premium?
- Rules Governing Issuing Title Policies

4:30-6 p.m.UNIT 4

Accounting Principles and Practices for Escrow/ Settlement and Title Agents

Brenda Nelson, Old Republic National Title Insurance Company

Nancy Waggoner, CPA

- Important Terms to Understand – Including the Role of a Fiduciary
- Texas Minimum Escrow Accounting Standards
- Trust and Escrow Accounts
- Texas "Good Funds" Rule
- Audit Process and Texas Minimum Requirements for Audits
- Guaranty Fees – Collecting, Managing and Reporting

6-6:30 p.m.Networking Reception

TUESDAY, APRIL 9

7:30 a.m.Continental Breakfast

8-9:15 a.m.UNIT 5

Financial Responsibilities of the Title Agent – Outside of Escrows

Dawn Enoch Moore, Allegiance Title Company

Nancy Waggoner, CPA

- Create a Business Plan
- Forecasting and Budgeting in Title Insurance and Escrow/Settlement
- General Business Accounting and Financial Duties
- State and Federal Reporting for Title Agents
- Owner/Manager Checklist
- Reporting Calendar

9:30-10:30 a.m. ...UNIT 6

Additional Duties and Responsibilities of a Title Insurance Agent

Celia C. Flowers, Attorney, Flowers Davis, P.L.L.C. and

East Texas Title Companies

G. Roland Love, Independence Title

- Reducing Risks for Underwriters and Owners
- Hiring and Managing Employees
- Responsibilities of Manager, Escrow Officer, Agent, Etc.
- When to Call the Underwriter
- Escrow/Settlement Work Flow
- Claims and Losses

10:30-11:30 a.m. .UNIT 7

Review, Reminders and Miscellaneous Information

J. Christopher Phillips, First National Title Insurance Company

Angela Fling, Westcor Land Title Insurance Company

- All Agents Are Not Equal
- Not all Closings Are the Same
- Potential Areas of Risk
- Not All Transactions Are Insurable
- What it Takes to Obtain a Title Agent's License in Texas
- How to Keep Track of Prospective Changes

11:45-1 p.m.Ethics Panel Discussion and Boxed Lunch

Various Presenters

- Join our panel of experts as they discuss a variety of fact-based scenarios posing ethical dilemmas for title professionals.

Attendees are encouraged to review the Basic Manual prior to attending this program. The TLTA Basic Manual is [available for purchase](#).

CONTINUING EDUCATION

8.0 hrs. of CE credit from the Texas Department of Insurance and 1 hour Ethics.

LOCATION

The Highland Dallas

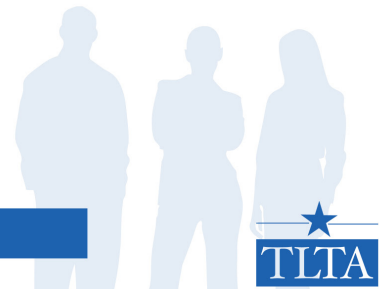
5300 E. Mockingbird Ln., Dallas, TX 75206

Reservations: 855.426.0597, ref. Texas Land Title Assoc. or [click here](#)

Rooms will sell out soon! Group Rate: \$174

OWNING AND MANAGING A TEXAS TITLE AGENCY

A COMPREHENSIVE PROGRAM FOR PROFESSIONALS PRESENTED BY THE TEXAS LAND TITLE ASSOCIATION



REGISTRANT

Confirmations will be emailed prior to the program. You may also confirm your registration by checking the *Owning and Managing a Texas Title Agency* pre-registration list on the TLTA website. If confirmation is not received, call TLTA at 512.879.2882

Name _____ Company _____

Mailing Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____ Email _____

REGISTRATION FEES

Early Registration
\$405 Member or Nonmember
Registrations received on or before March 25

Late Registration
\$455 Member or Nonmember
Registrations received after March 25

REGISTER
ONLINE

PAYMENT OPTIONS

CHECK

Mail check made payable to TLTA:

TLTA | 1717 W. Sixth Street St. 120 | Austin, TX 78703

CREDIT CARD

Enter credit card information and:

- **mail** to address above
- **email** to education@tltta.com

Visa MasterCard AMEX DISCOVER

Card Number _____

Exp. Date _____

Name on Card _____

CANCELLATION POLICY

The registration fee, less a \$25 cancellation charge, is refundable if notice is received by March 18, 2019 (emails or faxes only). No refunds will be issued for cancellations received after March 18. No-shows will not be refunded; however, substitutions may be made. Space is limited, so please submit your registration early!

TLTA use only:

date received _____

amount _____

check# _____ date entered _____

NOTES

This information is being provided by TLTA for educational and reference purposes only, and is not intended to represent the only approach to any particular issue. This information should not be construed as legal, financial or business advice from or on behalf of TLTA, and users should consult their own legal counsel and subject-matter experts to ensure that any policies adopted or actions taken meet the requirements unique to their company. TLTA sponsors this seminar to contribute to the continuing education of its members and others. In keeping with TLTA policy, participants must exercise independent judgment in deciding how to conduct their business.

If you require special assistance to attend this seminar, email education@tltta.com

CONSENT TO USE PHOTOGRAPHIC IMAGES:

Registration and attendance at, or participation in, TLTA's meetings and other activities constitutes an agreement by the registrant to TLTA's use and distribution (both now and in the future) of the registrant's or attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such events and activities.