

TEXAS LAND TITLE INSTITUTE

DEC. 9-10, 2021 | HYATT REGENCY HILL COUNTRY RESORT AND SPA | SAN ANTONIO

Earn all of the accredited CLE needed for your annual MCLE requirements at the **Texas Land Title Institute!**

A comprehensive course designed for real estate attorneys and advanced title professionals!

DONT MISS THE

OPTIONAL PRE-INSTITUTE PROGRAM DEC. 8

- **Title Insurance & Doc Prep:** Defining Issues and Closing the Deal

Thursday, Dec. 9

- 7:45 am **Check-In and Continental Breakfast**
- 8:30 **Case Update, Part I**
David A. Weatherbie, Cramer Weatherbie Richardson Oliver LLP, Dallas
- 9:15 **Legislative Update**
Steve Streiff, Old Republic National Title Insurance Company, Houston
- 9:45 **Break**
- 10 **Changes to the Mechanics' Lien Laws**
Bradford W. Irelan, Irelan McDaniel, PLLC, Houston
- 10:30 **Title Examination Standards – What's New; Case Law and Legislative Changes**
Roland Love, Independence Title, Dallas
- 11 **Death in the Chain of Title – A Reference Guide - 2d Ed.**
Thad Barreneche, Title Resources Guaranty Company, Dallas
- 11:30 **Marital Property – Family Code Requirements**
Leslie S. Johnson, WFG National Title Insurance Company, Dallas
- 12 pm **Networking Luncheon**
- 1 **How Does an Examiner Produce the Title Product?**
Ben Cornish, Stewart Title Guaranty Company, Dallas
- 1:45 **Expansive Court Orders – Limited Guardianships, DPOAs, Receiverships**
Bruce Goldston, Texan Title Insurance Company, San Antonio
- 2:15 **The Spousal Deed – What Is the Analysis?**
Ron J. Dold, Westcor Land Title Insurance Company, Houston
- 2:45 **Break**
- 3 **Surveys and Their Many Challenges**
Lisa M. Beville, JD, CPA, CTIP, Fidelity National Title Group, Dallas
- 3:30 **Acreage Development – Addressing Title Objections**
John H. Dorris, First American Title Insurance Company, Houston
- 4 **Preventable Claims, Including Pandemic Foreclosures**
Randal Lynn Telford, Title Resources Guaranty Company, Dallas
- 4:30 **Condominiums – What's New**
Casson Wen, Roberts Markel Weinberg Butler Hailey PC, Houston
- 5 **Condominiums – Recurring Underwriting Issues**
Rich Halfmann, First American Title Insurance Company, Santa Ana, CA
- 5:30 **Keynote Address – Economic Update: Comptroller Glenn Hegar Shares His Outlook for the Texas Economy and the Real Estate Sector**
Glenn Hegar, Texas Comptroller of Public Accounts, Austin
- 6-6:45 **Welcome Reception With Sponsors**
Bar closes at 6:45 pm

Friday, Dec. 10

- 7:30 am **Continental Breakfast**
- 8 **Case Update, Part II**
David A. Weatherbie, Cramer Weatherbie Richardson Oliver LLP, Dallas
- 8:45 **Missing Heirs – Getting Your Deal Closed**
Michael Lucksinger, Highland Lakes Title, Burnet
- 9:15 **Options and Rights of First Refusal**
Emilio Longoria, St. Mary's University School of Law, San Antonio
- 9:45 **Break**
- 10 **Subordination**
MarJuana Williams, MarJuana Bush Williams, PLLC, Houston
- 10:30 **The 1031 Exchange – A Tool for Construction and Remodeling**
Greg Lehrmann, Asset Preservation, Inc., Austin
- 11 **Preserving Policy Protection for Transferees, Entities, Series LLCs**
Chance Perkins, First National Title Insurance Company, Plano
- 11:30 **Ethics**
Claude E. Ducloux, Attorney at Law, Austin
- 12:15 pm **Luncheon Presentation What's on the Horizon**
Mark Sprague, Independence Title, Austin
- 1:30 **12 Steps to Personal IT Security**
Keith Mullen, Saxony Partners, Dallas
- 2 **Title Monitoring Services and Texas Laws on Forgery**
Blair Moore Raggio, Allegiance Title Company, Dallas
- 2:30 **Equitable Subrogation – Home Equity, Intervening Liens, and Zepeda**
Paul J. McConnell, III, De Lange, Hudspeth, McConnell & Tibbetts, L.L.P., Houston
- 3 **How Good Is That Deed Into a Trust?**
Richard Worsham, Westcor Land Title Insurance Company, Houston
- 3:30 **The Texas Supreme Court Visits Correction Deeds – Is There a Rule?**
Jeremy T. Brown, Keating Brown PLLC, Richardson
- 4 **Adjourn**

SELF-STUDY PAPERS:

- **REPLT Legislative Report**
John H. "Jack" Miller, III, Jack Miller Law PLLC
- **Property Statutes Not in the Property Code**
Richard Melamed, Attorney at Law, Houston
- **Recent Title Insurance and Escrow Cases National Survey**
Jerel J. Hill, Jerel J. Hill Law Office

OPTIONAL
PRE-INSTITUTE PROGRAM



TITLE INSURANCE & DOC PREP:
Defining Issues and Closing the Deal

HYATT REGENCY HILL COUNTRY RESORT AND SPA | SAN ANTONIO | DEC. 8, 2021

New, improved and back for a ninth 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. 8, 2021

9:30 a.m.Registration and Refreshments

10 a.m.Introduction To Title And Survey Review, Title Insurance, And Document Preparation

How important are the contract and loan requirements? What is the regulatory environment for title insurance?

Roland Love, Independence Title, Dallas

10:20 a.m.The Commitment

Reviewing and making objections. How to address and resolve exceptions and objections?

Richard Melamed, Attorney at Law, Houston

11 a.m.Survey Review

Why is a survey important to the title insurance transaction? When is one required? When can a prior survey be used? What additional survey coverage is available?

Lisa M. Beville, JD, CPA, CTIP, Fidelity National Title Group, Dallas

11:40 a.m.Endorsements in Texas

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?

Ginny H. Abiassi, North American Title Insurance Company, Houston

12:40 p.m.Lunch Presentation: Closing Issues

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

Charles J. Jacobus, Charter Title Company, Houston

1:30 p.m.Rate Rules

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

Paul McNutt, Jr. Title Resources Guaranty Company, Dallas

2 p.m.The Policy; Making and Handling Claims

What are new coverages? Which exclusions and conditions are important to the "deal?" What is not covered? 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

2:45 p.m.Break

3 p.m.Preparing a Deed

What type is appropriate? What are the components?

Roland Love, Independence Title, Dallas

3:35 p.m.Preparing Releases and Lender Docs

What is being released? Are all releases the same? Aspects to watch out for in the deed of trust.

Suzanne Frossard, M. Suzanne Frossard, PC, Fort Worth

4:10 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, Attorney at Law, Houston

5:30 p.m.Adjourn and Networking Reception
Program subject to change

MCLE and Escrow – 6.5 hours credit available (pending approval)

TREC – 6 hours credit available (pending approval)

Institute Information

Continuing Education Credits

Attorneys* – 15 hours MCLE credit (including 3 Ethics)

Also approved for 14 hours in the area of Real Estate Law by the Texas Board of Legal Specialization.

*includes 1 hour self-study paper

Title Agents and Escrow Officers

General Escrow (TBD) (pending TDI approval)

Paralegals – 14 hours CLE credit

Allowed credit through the State Bar of Texas Paralegal Division (pending approval)

Real Estate Brokers – 9 hours MCE credit

This course is real estate-related and has been approved by the State Bar of Texas for MCLE participatory credit. TREC will award up to 9 hours of Elective credit to real estate licensees. For MCE credit, you must submit to TREC a course completion certificate and a credit request form, which will be available at the course.

Register Now! Sellout Is Expected

No on-site registration.

\$675 Early Registration Fee (expires Nov. 1)

\$755 Late Registration Fee (after Nov. 1)

\$100 Hard copy of Course Materials Notebook

NOTE: Registration includes tuition, Institute course materials downloadable via a link (no flash drive). If you also want a hard copy of the materials in a looseleaf notebook, an additional \$75 fee is required.

Hotel Accommodations – Hyatt Regency Hill Country Resort and Spa

Call 888.421.1442

Single or double room, limited group rate available until Nov. 16 or until sold out.

Questions?

TEXAS LAND TITLE ASSOCIATION

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Please type or print clearly. If you require special assistance to attend this seminar, please attach a written description or call the TLTA Education Department: 512.879.2878

SAVE TIME

REGISTER ONLINE!

www.tlta.com/institute

Full Name _____
First Name for Badge _____ Title _____
Firm/Company _____
Address _____
City _____ State _____ ZIP _____
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Phone _____ FAX _____

Institute Registration, Dec. 9-10

Includes tuition, course materials available **via a web link only this year** (no flash drive) luncheons and reception

Does not include printed Course Materials Notebook; see below for purchase

Early Registration Fee (expires Nov. 1) \$675

Late Registration Fee (applies after Nov. 1) \$755

Other Offerings

Paper Copy of Institute Materials

Printed Course Materials Notebook purchased **WITH** Institute Registration (to be picked up at Institute registration)

\$100

Printed Course Materials Notebook purchased **WITHOUT** Institute Registration (to be mailed after the Institute; includes tax and shipping)

\$250

Optional Pre-Institute Program, Dec. 8

Title Insurance & Doc Prep: Defining Issues and Closing the Deal

Includes tuition, hard copy of course materials, luncheon and Wednesday reception

\$400 nonmember

\$350 TLTA member discounted

Total Enclosed \$

Payment Options

1) Check - Make payable to TLTA and mail to:

TLTA, 1717 W. 6th Street, Ste. 120, Austin, TX 78703

2) Credit Card - Enter your credit card information below and:

- mail to address above

- fax to 512.472.5931 -or- email to education@tlta.com

Visa MasterCard American Express Discover

Card Number _____

Exp. Date _____

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3) Register and Pay online at www.tlta.com/institute

Space Availability: Space is limited and is expected to sell out, so please register early. No on-site registration. (If you wish to register after Nov. 19, call TLTA at 512.879.2882.)

Cancellation Policy: For a full refund, submit any cancellation requests on or before Nov. 29.

Questions? 512.472.6050
education@tlta.com

Hotel accommodations:

- Hyatt Regency Hill Country Resort and Spa, 9800 Hyatt Resort Drive, San Antonio, Texas, 78251
- Call 888.421.1442 or 402.592.6464

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Dec. 8-10, 2021 Hyatt Regency Hill Country Resort and Spa – San Antonio