



2010 Escrow Institute Spring Conference



April 23 – 25, 2010

Temecula Creek Inn
44501 Rainbow Canyon Road
Temecula, California

Conference Sponsors

Platinum

**Citizens Business Bank
First American SMS
RBJ Software, Inc.**

Gold

**Bank of the West
Union Bank**

Silver

**Archive It!
City National Bank
Professional Business Bank
Rammell & Company
Stone Creek Escrow, Inc.**

Tentative Program Agenda

FRIDAY – April 23

- 10:00 am – 2:00 pm Board of Directors Meeting (*Kiva 3*)
1:00 – 4:30 pm Registration for Conference (*Yula Patio*)
2:30 – 4:30 pm **Management Specialists Roundtable** – For Owners & their Managers (*Yula 2*)
5:00 – 7:00 pm BBQ "**Hoedown**" with music from the "*Highwayman*"
(*Plaza South – right of the Temet Grill Restaurant*)

SATURDAY & SUNDAY MEETINGS WILL BE HELD IN YULA 2 BALLROOM

SATURDAY – April 24

- 8:00 – 9:00 am Buffet Breakfast (*Yula 2*)
8:00 – 11:00 pm Registration (*Yula Patio*)
9:00 – 9:30 am **Welcome/Opening Remarks** (*Yula 2*)
Convener: Beulah Stidham – President, Escrow Institute of California

9:30 – 10:30 am **KEYNOTE MOTIVATIONAL PRESENTATION: Tara-Nicholle Nelson**

The Art + Science of Being Indispensable – As air is indispensable to life, so is escrow to real estate transactions. Escrow providers whose customers recognize their indispensability are insulated from market drama and bad client behavior.

Real estate broker, attorney, author and syndicated columnist Tara-Nicholle Nelson – a raving fan of her own favorite escrow providers – will take you on an inspirational deep dive into both the warm, fuzzy and hard-core, actionable ingredients escrow companies can stir up to render themselves absolutely necessary, *and make sure* your clients know it.

Paradoxically blending her smart humor with game-changing mindset shifts and action items EIC Members can take to max out their own indispensability factor, Tara will enlighten, inspire and entertain during this keynote. You *will* want to take notes!

10:30 – 10:45 am **BREAK**

10:45 – 11:45 am **ARTHUR E. DAVIS III, ESQ. – AEA GENERAL COUNSEL / EXECUTIVE ADMINISTRATOR** – It is a privilege to have Mr. Davis the long-time General Counsel join the Spring Conference. With the change in National Administration and therefore focus, Art will try to demystify the various pending regulatory and legislation initiatives and what it may mean for the escrow/settlement industry.

12:00 – 1:15 pm **“LEGISLATOR OF THE YEAR” – ASSEMBLYWOMAN CATHLEEN GALGIANI**

Assemblywoman Galgiani undertook an effort to enact AB 957 – Buyer’s Choice Act against overwhelming odds and monumental opposition. The Institute will bestow our first ever “Legislator of the Year” in recognition of Ms. Galgiani’s tireless efforts. Cathleen will share her experiences, as well as update us on the effort to improve upon AB 957 with the introduction this year of clean-up legislation.

1:30 – 2:30 pm **TBA**

2:30 – 2:45 pm **BREAK**

2:45 – 4:30 pm **HUD 101 Continues – but this time from the PEOPLE THAT WROTE THE REGULATIONS**

The Institute has held numerous workshops for Members in an attempt to fully understand the new HUD regulations and sometimes mind boggling requirements. In an effort to get closure on some of the remaining issues, the Institute has invited two senior representatives from HUD to join us in a workshop session.

Presenters: Barton Shapiro – Deputy Director
HUD Office of Regulatory Affairs and Manufactured House (Invited)

Andrew Fay – Supervisory Investigative Coordinator
HUD Office of RESPA & Interstate Housing (Invited)

4:30 pm **ADJOURN FOR THE DAY**

**EVENING ON
YOUR OWN**



SUNDAY, April 25

8:00 – 9:00 am Buffet Breakfast (*Yula 2*)

9:00 – 10:00 am **FEDERAL/STATE LEGISLATIVE/REGULATORY UPDATE (*Yula 2*)**

This session will provide updates on various 2010 state legislative proposals, and federal initiatives to regulate financial services industry and possibly escrow/settlement service providers.

Panelists: Art Davis, AEA General Counsel / Executive Administrator
Tim Egan – Chief Executive Officer, Escrow Institute of California

10:00 –10:15am **BREAK**

10:15 – 11:45 am **PRINCIPAL RESIDENCE TAX ISSUES** – The questions that a CPA has to ask their Client in connection with the purchase, operation and sale of a principal residence.

Presenter: C. Anthony “Tony” Phillips, CPA – Downstream Exchange Company

11:45 am – 12 pm **RAFFLE GIVEAWAYS**

12:30 pm **CONFERENCE ADJOURNMENT**



Credits – 9.25 Credits: Friday – 2.0 / Saturday – 4.75 / Sunday – 2.50