

## Limited Practice Officer Refresher Course



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**ORIGINAL PROGRAM DATE**

July 21, 2023

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**AVAILABLE MEDIA TYPES**

Video & Audio MP3

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### REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a live webcast on July 21, 2023, in Seattle, WA. If you attended the live webcast and reported CLE credits, you cannot also report credits from watching or listening to this recording if repeated within your three year reporting period.

### DESCRIPTION

This one-day program is designed to meet the seven-hour live reinstatement CLE course requirement of the WSBA bylaws which allows a Limited Practice Officer who has been inactive for six or more years to transfer to active status while waiving the Limited Practice Officer examination. It is also being made available to active Limited Practice Officers and all WSBA members for continuing legal education credit.

This course will benefit active LPOs who would like a refresher of the Limited Practice Board approved documents and a thorough discussion of current title insurance issues and some of the more troublesome title clearing challenges faced during the course of a real estate closing. The course will also provide a thorough discussion of the Rules of Professional Conduct presented by Washington State Bar Association Senior Professional Responsibility Counsel, Jeanne Marie Clavere. Shelly Opdycke will also examine the scope of practice for Limited Practice Officers and talk specifically about recurring issues in this area.

Attorneys who would like to better understand the Limited Practice Officer's role in real estate closings generally would benefit from this course. This course will provide a primer for attorneys who are interested in learning more about real estate closings and the major documents utilized during a real estate closing as well as a good introduction/discussion of real estate title insurance and some best practices for clearing a real estate title in preparation for a real estate closing.

This is an annual program. Please note that per APR 11(c)(2), a lawyer, LLLT, or LPO cannot receive credit for an identical activity taken within the same reporting period.

*Agenda begins on the next page.*

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### AGENDA

#### 1 A Walk in the Park with LPO Documents

This session, recorded on July 20, 2022, will review the Limited Practice Board approved documents and discuss when the documents should be selected for use. A special focus will be placed on documents that have changed over the past seven years. The speaker will also cover excise tax which is triggered by a conveyance document and associated exemptions under the Washington Administrative Code.

*Dee McComb - Settlement Solutions, Bainbridge Island, WA*

#### 2 A Review of the RPCs for Limited Practice Officers

Jeanne Marie Clavere, Senior Professional Responsibility Counsel with the WA State Bar Association, will examine the Rules of Professional Conduct applicable to Limited Practice Officers and discuss some relevant hypotheticals.

*Jeanne Marie Clavere - Washington State Bar Association, Seattle, WA*

#### 3 Changes in the Title Insurance Industry

This session takes a deep dive into title insurance updates and changes. The material covered will include an explanation of the acronyms TODD, ALTA, WOCIOA and RON/RIN.

*Bill Ronhaar - Whatcom Land Title Company, Inc., Bellingham, WA*

#### 4 The Title Clearing Obstacle Course

To get a property to closing, the title must be free and clear of all encumbrances. Clearing title is a fundamental escrow closing process and can be very complex and time consuming. In this session, the most common and most complicated title clearing issues will be explored.

*Kirk Strandjord - First American Title Insurance Company, Seattle, WA*

#### 5 Limits to Scope of Practice

When do you help and when do you say no? Shelly Opdycke will discuss the limits to scope of practice and talk through several real life scenarios that place Limited Practice Officers in peril of going outside of the scope of practice.

*Shelly Opdycke - First American Title Insurance Company, Seattle, WA*