Limited Practice Officer Reinstatement Course 2026

ORIGINAL PROGRAM DATE
March 26, 2026

REPORTING YOUR CREDIT

This on-demand program was a live seminar presented on March 26, 2026. If you attended or viewed the original presentation, please note that WSBA members may not claim credit for the same CLE sessions if repeated within their three-year reporting period.

DESCRIPTION

This special seminar, originally designed as part of the WSBA Limited Practice Officer (LPO) Reinstatement Course, is now offered to all interested members and other legal professionals. The content has been vetted as essential information that an LPO practicing in Washington today must know.

AGENDA

1 Selecting, Preparing and Completing Limited Practice Board Approved Forms

In this section, participants will examine the documents the LPO Board has approved for LPOs to select, prepare, and complete. Next participants will review best practices for completing the forms accurately, including where to locate the necessary information within a Purchase and Sale Agreement and a Title Report. This will also include a targeted focus on the correct vesting for deeds and guidance on signing capacities.

Holly Haines – CW Title and Escrow, Bellevue, WA

2 The RPCs for LPOs and How the Bar Can Help

Sandra Schilling, 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. In addition to this important review, Sandra will provide an intro to other resources available through the WSBA, research, wellness, ethics line, and speaking opportunities.

Sandra Schilling, Washington State Bar Association, Seattle, WA
Holly Haines – CW Title and Escrow, Bellevue, WA

3 Limited Practice Officer Scope of Practice, Rules of Professional Conduct and Standard of Care

This section reviews the Admission to Practice Rule (APR) 12 – The Limited Practice Rule. We will outline the Scope of Practice for a Limited Practice Officer, discuss the Standard of Care an LPO is to uphold, and provide real-world case examples to highlight the importance of these guidelines.

Holly Haines – CW Title and Escrow, Bellevue, WA

Agenda continues on the next page.

Limited Practice Officer Refresher Course 2026

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4 [VIDEO REPLAY] The (Title) Problems with Probates

Originally presented as part of the program *True to Life Title Issues* recorded on January 23, 2024.
The normal probate process in Washington is fast, efficient, and less costly than in many other states and that includes transfer of title from the decedent to the heirs or beneficiaries. However, title problems do arise, and this panel discussion will consider various real-life examples of what to look for and approaches for resolving these issues.
Holly Surface – Des Moines Elder Law, Des Moines, WA
Saphronia R. Young – Des Moines Elder Law, Des Moines, WA

5 Building Your Network, Your Reputation, and Your Practice

Being terrific at your work doesn't get you anywhere if no one knows who you are, what you do, and who you can help. This session will cover how to define what you do, build and maintain your network of referral sources, and create and enhance your reputation in the legal profession.
Dean Alterman – Alterman Law Group PC, Portland, OR

6 Avoiding the Pitfalls of Seller Financing

Sellers sometimes provide financing to buyers of residential and particularly investment properties. This talk will address the potential pitfalls of that arrangement, particularly when the seller agrees to subordinate to other purchase-money financing obtained by the buyer. Understanding these risks requires an appreciation of lien priority and the bidding process in foreclosure, as well as how buyers have taken advantage of poor drafting by sellers to protect the seller's interests.
Steven Bender – Seattle University School of Law, Seattle, WA

7 How to Read and Respond to a Title Report

Nearly every real estate sale includes a preliminary title report for the buyer to review, approve, or object to. This session explains the parts of a title report, the different kinds of exceptions, which ones to object to, and how to object.
Dean Alterman – Alterman Law Group PC, Portland, OR