

**2008 JETT AWARDS COMPETITION**

**Large Chapter—CLE Series of Related Topics**

**Promotion of Educational Series**

**Submitted by:**

Houston Association of Legal Professionals (Texas)

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Marty S. Olson, PLS, TSC-RE—Continuing Education Cochair  
Helene L. Wood, PP, PLS, TSC-RE—Continuing Education Cochair

**2008 Jett Awards Competition  
Houston Association of Legal Professionals  
Super CLE Saturdays 2008-2009**

**I. General Description of Your Program**

- A.** The official title of the program, the classification and category for which the entry is being submitted, the state/chapter name, and your name, address, telephone number, and email address.

Official Title: Super CLE Saturdays 2008-2009

Classification: Large Chapter

Category: CLE Series of Related Topics

Chapter: Houston Association of Legal Professionals (Texas)

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- B.** A brief description of your program, including its format, size, purpose, topic, and audience.

Super CLE Saturdays 2008-2009 is a lecture series comprised of five all-day seminars providing 7.5 hours (includes 1.0 hour of ethics) of continuing legal education credits each, with the seminar topics based on the subjects covered by Part 4 of the NALS Professional Paralegal exam, and developed to assist secretaries and paralegals holding the PLS certification in studying for the Professional Paralegal exam and who wanted the education.

- C.** A brief summary of your program.

The lecture series is based on the topics covered by Part 4 of the NALS Professional Paralegal exam. The five all-day seminars were held on Saturdays in September, October, November, January, and February from 9 a.m. to 5 p.m., with fifteen-minute breaks in the morning and in the afternoon. Generally, the ethics session was scheduled as the first topic of the day. At each seminar a Continental breakfast and a working lunch was provided by corporate sponsors that complemented the seminar. (See promotional flyers for the series at Tab 1 and for each seminar in the series at Tab 2.) The focus of each seminar was as follows: (1) September 6, 2008—Nuts & Bolts of Texas Real Estate; (2) October 4, 2008—Texas Civil Litigation (Advanced); (3) November 1, 2008—Nuts & Bolts of Business Organizations; (4) January 10, 2009—Nuts & Bolts of Intellectual Property; and (5) February 7, 2009—CLE Lagniappe (Administrative Law; Criminal Law; Family Law; Torts; and Wills, Trusts, and Estates). At the end of each seminar, each attendee was presented with a personalized CLE certificate (see Tab 3).

## **II. Judging Criteria**

### **A. Needs Assessment**

#### **1. How was the need for this program identified?**

Houston ALP is known for its NALS Basic Legal Training Course program in preparation for the ALS exam and its study group in preparation for the PLS exam. Since the NALS Professional Paralegal certification was set in place, Houston ALP has received many requests to provide a study group geared to the Professional Paralegal exam. Also, many legal secretaries and paralegals in the Houston area hold certifications needing recertification so there was a need for substantive legal education to help them with the recertification process.

#### **2. How does this program address this need?**

This program addresses the double need for a study group geared to the Professional Paralegal exam and for substantive legal education credits needed by local legal secretaries and paralegals for recertification by providing a lecture series based on Part 4 of the Professional Paralegal exam timed for the March 2009 exam, which will, in turn, provide substantive legal education for recertification purposes.

### **B. Planning and Design**

#### **1. List the program's objectives.**

- a. To respond to the many requests for assistance in preparing for Part 4 of the Professional Paralegal exam.
- b. To provide affordable continuing education to the legal secretaries and paralegals in the Houston area who need recertification credit or who want the education.
- c. To earn nondues income to support various chapter programs and activities.

#### **2. Describe the steps taken to design and develop the program.**

- a. At the beginning of the year, a brainstorming session was held among the two education committee cochairs, the new chapter president, the chairs of the various certification committees, and a past certification advisor. The purpose of the session was to determine the focus of the education for the year which would meet the needs of members and nonmembers and respond to requests from members. Since most of the suggested topics were ones covered by the Professional Paralegal exam, it was

decided that Part 4 of the exam would be the basis for the education that would be provided. Choosing that focus responded to two requests from members: (1) the individual topics needed for recertification credit and (2) a study group for Part 4 of the Professional Paralegal exam. It was also decided that education would be best delivered through a series of lectures spread over several months to help with the financial burden of attending the seminars and to help with the time needed to attend the sessions.

- b. Once the basic structure of the education was set, a budget was developed. Education was the main goal, but a necessary byproduct was income generation. For the success of the program, it was necessary to make the seminars affordable to members and nonmembers, so a registration fee of \$60 was set for each all-day seminar, and the fifth seminar was designated as a bonus session for anyone who had attended the first four seminars. From experience, we estimated that we could expect between 10 and 30 registrations for each seminar, which would produce a projected income ranging from \$3000 to \$7000. Since most of the out-of-pocket expenses were expected to be donated by members and local law firms, the actual expenses would be minimal.
- c. After designating the subjects of the seminars, specific areas to be covered by each seminar were set, volunteer speakers sought, and schedule set. Once those were determined, promotional flyers were created for distribution to the community.
- d. The committee decided that it would be advantageous to provide a Continental breakfast at each seminar, so corporate sponsors were sought to complement the specific seminars. This naturally led to seeking corporate sponsors to also provide lunch at the seminars and to incorporate the luncheon sponsors into educational sessions. Instead of taking lunch breaks, we were able to make them working lunches.
- e. Speakers for the ethics sessions were obtained through the Houston Bar Association's speakers bureau.
- f. Houston-area lawyers volunteered for the remaining subjects.

## C. Logistics and Production

### 1. How was the program delivered to the target audience?

The program was delivered to the target audience through lectures. Space for the seminars in the program was donated by Fulbright & Jaworski L.L.P. at the Fulbright Tower, which is centrally located in downtown Houston, Texas, and which provided free parking in the building. The space was in Fulbright's

training center and provided classroom seating. Computer access was available for anyone attending who wanted to bring his/her own computer. Speakers had access to the equipment provided in the training room (computer, projector, whiteboard, etc.). Also, a break room was located across from the training room where breakfast and lunch was set out to take back to the seminar room.

2. Provide details describing educational materials, methods, and resources. Include samples of printed materials used.

The education provided was delivered through lectures. Handouts were provided by the various speakers and corporate sponsors. (See samples of printed materials provided at Tab 4.)

**D. Budgeting and Finance**

1. What is the annual income and expenses of your chapter/state?

Houston ALP's balanced budget projects annual income and expenses for 2008-2009 is \$13,250.

2. Was this program funded in whole or in part by a Grant from the NALS Foundation?

This program was not funded by a grant from the NALS Foundation.

3. What were the program's broad financial objectives?

Over and above the educational objectives of the program, the broad financial objective was to earn nondues income to fund various chapter activities and special projects. Although we needed to earn nondues income, the registration fee still needed to be affordable to legal secretaries and paralegals in the Houston area who would want to attend the seminars. In line with that, a registration fee of \$60 was set for each all-day seminar, and the fifth seminar was designated a bonus session for anyone who attended the first four seminars.

4. Provide both the projected revenue and expense, as well as the actual revenue and expense.

Projected Revenue:	\$3000-7000
Projected Expenses:	\$500
Actual Revenue:	\$2500 (as of 10/31/08)
Actual Expenses:	\$130.62 (as of 10/31/08)

**5. Provide your best estimate of association resources expended on this program.**

Total Dollars Expended: \$130.62 (as of 10/31/08)

Total Volunteer Time Expended: 90-150 hours

Total volunteer time expended by chapter members includes:

- A brainstorming session in developing the program.
- The time of seven chapter members in preparing and mailing personalized letters transmitting the promotional flyer to Houston-area corporate counsel.
- Preparing the master promotional flyer and flyers for each seminar.
- Attendance by the two committee cochairs at each seminar and preparing and cleaning the space before and after the seminar.

Additionally, all speakers were volunteers, and all copying expenses and seminar space were donated by a local law firm.

**E. Marketing, Promoting, and Advertising**

**1. List and describe the specific marketing, promotional and advertising vehicles used.**

- A series flyer was designed initially, with seminar-specific flyers developed for each seminar in the program.
- The series flyer was distributed to the members of the local chapter of the Association of Legal Administrators.
- The series flyer was provided to the Texas Institute for Specialty Certification.
- The series flyer was distributed with a personalized letter to area corporate counsel inviting their staff to attend.
- The series flyer and seminar-specific flyers were distributed by members in their offices and their office buildings.
- All flyers were distributed at various chapter events, including flyers for upcoming seminars at each of the seminars in the program.

- An announcement about the upcoming seminars in the program was made at each chapter membership meeting.
- Notices of the series and each seminar were given to the Houston Bar Association for publication in their newsletter.
- The seminars were advertised on Houston ALP's Web site.
- The series flyer was provided to the Academic Dean of the Law Faculty of the Center for Advanced Legal Studies (The Paralegal People®) in Houston, Texas.
- Mass e-mails for each seminar were distributed to chapter members.
- Seminar notices were included in the calendar of events in the monthly membership notice distributed to chapter members.

#### **F. Evaluation**

##### **1. To what extent did the program achieve stated objectives**

All objectives of the program were met. Nondues income was earned to support chapter activities and programs. A study tool was provided to assist local legal secretaries and paralegals holding the PLS certification in preparing for Part 4 of the Professional Paralegal exam. Affordable legal education was provided to the legal support staff in the community who needed recertification credit or who wanted the legal education.

##### **2. What broader impact, if any, did this program have on the growth, image or performance of the state/chapter or its members?**

People who did not know about Houston ALP became aware of it. People who attended the seminars are asking that the program be held again next year. The success of the program to date has increased Houston ALP's reputation for providing quality, reasonably-priced education for members and nonmembers alike. It remains to be seen if the program will increase local membership or garner new Certified Professional Paralegals.

##### **3. Based on the outcome of this program, describe the most significant changes that might be made the next time a similar program is offered.**

Development of the program took up a lot of time. It would have been better if it could have been started before the year began in order to hit the ground running. Although the development work will have been done for the next time the program is offered, promotion of the program should be done well in advance of the seminar dates.

**TAB 1**

**Super CLE Saturdays 2008-2009  
Series Flyer**

*Sponsored by* **HOUSTON ASSOCIATION OF LEGAL PROFESSIONALS**  
 Meets All Criteria for Recertification CLE for NALS,  
 Texas Board of Legal Specialization, and Texas Institute for Specialty Certification

# Super CLE Saturdays 2008—2009

*for Legal Secretaries, Paralegals, Legal Assistants, and Other Lawyer's Assistants*

*Excellent preparation for those sitting for Part 4 of the NALS Professional Paralegal Certification Exam*

<p align="center"><b>Nuts &amp; Bolts of Texas Real Estate</b></p> <p><b>September 6, 2008</b> ▪ CLE Credit: 7.5 hrs.  <i>Includes</i>—Ethics in a Real Estate Practice ▪      Purchase and Sale Agreement ▪ Title Matters ▪      Deeds of Trust ▪ Financing and Foreclosures ▪      Recording Title ▪ Closing Documents</p>	<p align="center"><b>Texas Civil Litigation (Advanced)</b></p> <p><b>October 4, 2008</b> ▪ CLE Credit: 7.5 hrs.  <i>Includes</i>—Ethics in a Civil Litigation Practice ▪ Legal      Research ▪ Legal Terminology ▪ Texas Rules of Civil      Procedure ▪ Texas Rules of Appellate Procedure ▪      Federal Rules of Civil Procedure ▪ Federal Rules of      Appellate Procedure</p>
<p align="center"><b>Nuts &amp; Bolts of Business Organizations</b></p> <p><b>November 1, 2008</b> ▪ CLE Credit: 7.5 hrs.  <i>Includes</i>—Corporate Research ▪ Business Ethics ▪      Life Cycle of Business Organizations ▪ Sarbanes-Oxley      ▪ Choosing Business Entities ▪ Obtaining EINs ▪      Registration Process ▪ And More</p>	<p align="center"><b>Nuts &amp; Bolts of Intellectual Property</b></p> <p><b>January 10, 2009</b> ▪ CLE Credit: 7.5 hrs.  <i>Includes</i>—Patents ▪ Trademarks ▪ Copyrights ▪      Trade Secrets ▪ And More</p>
<p align="center"><b>CLE Lagniappe</b></p> <p><b>February 7, 2009</b> ▪ CLE Credit: 7.5 hrs.  <i>Includes</i>—Administrative Law ▪ Criminal Law ▪ Family Law ▪ Torts ▪ Wills, Trusts, and Estates</p>	

ALL SESSIONS WILL BE HELD 9 A.M.—5 P.M. AT 1301 MCKINNEY, 51ST FLOOR, HOUSTON  
 HOUSTON ALP RESERVES THE RIGHT TO CHANGE OR CANCEL ANY SEMINAR IT DEEMS NECESSARY

**For more information, contact:**

Marty S. Olson, PLS, TSC ▪ 713.752.8631 ▪ molson@craincaton.com  
 Helene L. Wood, PP, PLS, TSC ▪ 713.651.3713 ▪ hwoodpls@fulbright.com

**Registration Deadline**

All registrations and checks for seminars must be received seven (7) days in advance of the date of the seminar. Refund requests must be in writing and made seven (7) days in advance of the date of the seminar.

**Registration Fee**

\$60 each (includes continental breakfast)

**Ask Us About Our Cool Deal—**  
 Register for the first 4 seminars and get the fifth one free.

**REGISTRATION FORM**

**Return registration form/payment to:** Helene Wood, PP, PLS, TSC ▪ 1301 McKinney, Suite 5100 ▪ Houston, Texas 77010

Please register me for the session(s) indicated below. Enclosed is a check for \$\_\_\_\_\_ made payable to Houston ALP.

Texas Real Estate  Texas Civil Litigation  Business Organizations  Intellectual Property  CLE Lagniappe

**Name:** \_\_\_\_\_

**Employer:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

**Daytime Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**TAB 2**

**Super CLE Saturdays 2008-2009  
Individual Seminar Flyers**



Sponsored by  
**HOUSTON ASSOCIATION OF LEGAL PROFESSIONALS**  
... providing continuing legal education for support staff in the Greater Houston area since 1956

# Super CLE Saturdays 2008-2009

*for Paralegals, Legal Assistants, Legal Secretaries, and Other Lawyer's Assistants*

## Nuts and Bolts of Texas Real Estate

*Meets All Criteria for Recertification CLE for NALS, Texas Board of Legal Specialization,  
and Texas Institute for Specialty Certification*

**September 6, 2008 ★ 9 to 5 p.m.**

**Registration Fee—\$60**

(Location: 1301 McKinney, 36th Floor, Downtown Houston)

**CLE Credit: 7.5 hours (includes 1.0 hour of ethics)**

8:30—**Registration and Welcome** (Continental breakfast courtesy of Simplifile)

9:00 **Real Estate Ethics**

▶ Michael P. Springer, *Sutherland*  
Ethical issues in a real estate practice

10:00—*Break*

10:15 **Purchase and Sale Agreement**

▶ Charles J. Jacobus, D.R.E.I., C.R.E.I., *Adjunct Professor of Law at the University of Houston Law Center*  
Commercial Purchase and Sale Agreement

11:45 **Title Matters**

(lunch served during session courtesy of First American Title Insurance Company)

▶ Catlin M. Tucker, Esq., *First American Title Insurance Company*

Title 101 (title insurance, chain of title, exceptions and exclusions, negotiating coverage, endorsements, underwriting, contents of title policy, scope of coverage, owner's and lender's coverage)—accredited by the Texas MCLE Board

1:00 **Financing and Foreclosures**

▶ Rob Wisner, *Crain, Caton & James*  
Deeds of trust, liens, promissory notes, involuntary termination of ownership

2:30—*Break*

2:45 **Recording Title**

▶ Penny Bonfitto, Director of Real Property Filings, Harris County Clerk's Office

▶ Francisco Herrera, *Simplifile*

Recording documents, original signatures, confidentiality notice; e-filing

3:45 **Closing the Gaps**

▶ Brian S. Harris, *Jackson Walker L.L.P.*

Closing checklist, closing statement, deed, etc.

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**Name:** \_\_\_\_\_

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**Mailing Address:** \_\_\_\_\_

**Daytime Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_



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*for Paralegals, Legal Assistants, Legal Secretaries, and Other Lawyer's Assistants*

## Texas Civil Litigation (Advanced)

*Meets All Criteria for Recertification CLE for NALS, Texas Board of Legal Specialization, and Texas Institute for Specialty Certification*

**October 4, 2008 ★ 9 to 5 p.m.**

**Registration Fee—\$60**

(Location: 1301 McKinney, 36th Floor, Downtown Houston)

**CLE Credit: 7.5 hours (includes 1.0 hour of ethics)**

**8:30—Registration and Welcome**

(Continental breakfast courtesy of Merrill Legal Solutions)

**9:00 Legal Research (1.0 hr.)**

► Ethan Carlyle Esq.—*Martin, Disiere, Jefferson & Wisdom, L.L.P.*

Legal research; research techniques; citations in pleadings and briefs; legal terminology

10:00—*Break*

**10:15 Ethics in a Civil Litigation Practice (1.0 hr.)**

► Michael M. Essmyer, Esq.—*Essmyer, Tritico & Rainey, L.L.P.*

Ethical issues in a civil litigation practice

**11:15—Working With Your Litigation Services Provider (1.0 hr.)**

► Joe Cerda—*HG Litigation Services*

Working with your litigation services provider to maximize your client's budget (lunch provided courtesy of HG Litigation Services)

**12:15 Texas Rules of Civil Procedure (1.50 hr.)**

► Toby Easley, Esq., and Jeffrey Matthews, Esq.  
Pleadings, statutes of limitation, discovery, trial, judgments

1:45—*Break*

**2:00 Texas Rules of Appellate Procedure (1.0 hr.)**

► Scott D. Ellis, Esq.—*Gardere Wynne Sewell LLP*  
Time tables, appellant's brief, appellee's brief

**3:00 Federal Rules of Civil Procedure (1.0 hr.)**

► Scott D. Ellis, Esq.—*Gardere Wynne Sewell LLP*  
Pleadings, statutes of limitation, discovery, time tables, trial, judgment

**4:00 Federal Rules of Appellate Procedure (1.0 hr.)**

► Scott D. Ellis, Esq.—*Gardere Wynne Sewell LLP*  
Time tables; appellant's brief; appellee's brief

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**Ask us about Our Cool Deal for registering for the first 4 seminars in the 2008 series**

**Registration Deadline**

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Please register me for the Texas Civil Litigation (Advanced) seminar. Enclosed is a check for \$ \_\_\_\_\_ made payable to Houston ALP.

Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_



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# Super CLE Saturdays 2008-2009

*for Paralegals, Legal Assistants, Legal Secretaries, and Other Lawyer's Assistants*

## Nuts & Bolts of Business Organizations

*Meets All Criteria for Recertification CLE for NALS, Texas Board of Legal Specialization, and Texas Institute for Specialty Certification*

**November 1, 2008 ★ 9 to 5 p.m.**

**Registration Fee—\$60**

(Location: 1301 McKinney, 36th Floor, Downtown Houston)

**CLE Credit: 7.5 hours (includes 1.0 hour of ethics)**

### 8:30—Registration and Welcome

(Continental breakfast courtesy of Henry Cabrera of National Registered Agents, Inc.)

### 9:00 Business Ethics (1.0 hr.)

► Robert Bennett, Esq. (The Bennett Law Firm)  
Ethical considerations for a corporate practice.

10:00 *Break*

### 10:15 Choosing a Business Entity (2.25 hr.)

► Greg Meeks, Esq. (Gardere Wynne Sewell LLP)  
Weighing the pros and cons of choosing a business entity.

### 12:30 Sarbanes-Oxley (0.5 hr.)

► Martin F. Doublesin, Esq. (Fulbright & Jaworski L.L.P.)  
Sarbanes-Oxley for paralegals and legal secretaries.

### 1:00—Survival Tips (1.0 hr.)

► Helene Wood, PP, PLS, TSC (Fulbright & Jaworski L.L.P.),  
and Marty Olson, PLS, TSC (Crain Caton & James)

Working with the Texas Secretary of State; obtaining EINS, choosing names; etc. (a working lunch sponsored by Capitol Services)

### 2:00 Corporate Research (1.0 hr.)

► Elizabeth M. Reza, Esq. (Gardere Wynne Sewell LLP)  
Researching acquisition of a business.

3:00 *Break*

### 3:15 Public Corporations (1.0 hr.)

► Gregory J. Sergesketter, Esq. (Gardere Wynne Sewell LLP)  
Do you know your alphabet?

### 4:15 Maintenance of Corporate Records (0.75 hr.)

► Melissa Cook and Edwin Cook II (Texas Corporation Supplies, Inc.-Liberty Legal)  
Minutes books, corporate seal, certificate paper, etc.

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Daytime Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_



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*for Paralegals, Legal Assistants, Legal Secretaries, and Other Lawyer's Assistants*

## Nuts & Bolts of Intellectual Property

*Meets All Criteria for Recertification CLE for NALS, Texas Board of Legal Specialization, and Texas Institute for Specialty Certification*

**January 10, 2009 ★ 9 to 5 p.m.**

**Registration Fee—\$60**

(Location: 1301 McKinney, 36th Floor, Downtown Houston)

**CLE Credit: 7.5 hours (includes 1.0 hour of ethics)**

**8:30—Registration and Welcome**

(Continental breakfast sponsored by CD Language Solutions)

**9:00—General Overview and Introduction (0.25 hr.)**

▶ Allen E. White, Esq. (Fulbright & Jaworski L.L.P.)  
Copyright, trademark, patent, and trade secret; domain names, unfair competition, and false advertising; transactional aspects

**9:30—Copyright (1.0 hr; 0.25 hr. ethics)**

▶ Jan K. Simpson, Esq. (Fulbright & Jaworski L.L.P.)  
Copyright law; purpose and effect of registrations; mechanics of registration; ethics.

**10:30—Break**

**10:45—Patent (1.5 hrs.; 0.25 hr. ethics)**

▶ Allen E. White, Esq. (Fulbright & Jaworski L.L.P.)  
Patent law; purpose and effect of patents; mechanics of patent prosecution; docketing of prosecution dates; ethics

**12:15—Lunch**

(Sponsored by Merrill Legal Solutions)

**1:00—Trademarks (1.5 hrs.; 0.25 hr. ethics)**

▶ Allen E. White, Esq., and John C. Rawls, Esq. (Fulbright & Jaworski L.L.P.)  
Trademark law; purpose and effect of trademark registration; preregistration due diligence; mechanics of trademark prosecution; transactions involving patents; ethics

**2:30—Trade Secret (0.75 hr.)**

▶ Thomas D. Paul, Esq. (Fulbright & Jaworski L.L.P.)  
Trade secret law; CDAs and employment/consulting agreements; transactions involving trade secrets

**3:15—Break**

**3:30—IP Litigation (2.0 hrs.; with 0.25 hr. ethics)**

Daniel Leventhal, Esq., and Ann L. Morgan, Senior Paralegal (Fulbright & Jaworski L.L.P.)  
Copyright; trademark; patent; trade secret; unfair competition and advertising; ethics

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Please register me for the Nuts & Bolts of Intellectual Property seminar. Enclosed is a check for \$ \_\_\_\_\_ made payable to Houston ALP.

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## CLE Lagniappe

*Meets All Criteria for Recertification CLE for NALS, Texas Board of Legal Specialization, and Texas Institute for Specialty Certification*

**February 7, 2009 ★ 9 to 5 p.m.**

**Registration Fee—\$60**

(Location: 1301 McKinney, 36th Floor, Downtown Houston)

**CLE Credit: 7.5 hours (includes 1.0 hour of ethics)**

### 8:30—Registration and Welcome

(Continental breakfast sponsored by Hilton Americas-Houston)

### 9:00—Ethics (1.25 hr.)

► William G. Lowerre, Esq. (Weatherford International, Ltd.)  
Ethics bingo.

### 10:15—Administrative Law (1.25 hr.)

► Sami Hartsfield, ACP (Paralegal to Christopher J. Lowman, Esq.)  
Scope; state agencies; federal agencies.

### 11:30—Criminal Law (1.25 hr.)

► George McCall Secret, Esq. (Bennett & Secret L.L.P.)  
Criminal law and procedures; jurisdiction; grand jury; disclosures; trial; sentencing; appeals; extradition; habeas corpus; probation; parole; landmark decisions of the Supreme Court

### 12:45—Lunch

(Sponsored by Hilton Americas-Houston)

### 1:15—Family Law (1.25 hr.)

► Hon. Doug Warne, Judge of the 311<sup>th</sup> Family Court of Harris County, Texas  
Influence of uniform acts; marriage; termination of marriage; child custody; special considerations

### 2:30—Torts (1.25 hr.)

► Thomas B. Swanson, Esq. (Academic Dean, Center for Advanced Legal Studies)  
Personal injury; products liability; malpractice

### 3:45—Wills, Trusts, and Estates (1.25 hr.)

► Frank Parish, Esq. (Schweinle & Parish, PC)  
Wills; trusts; durable powers of attorney; elder law; Uniform Probate Code; estate administration; federal estate tax returns; final account; guardianships and conservatorships; special probate procedures

HOUSTON ALP RESERVES THE RIGHT TO CHANGE OR CANCEL ANY SEMINAR IT DEEMS NECESSARY

#### For more information, contact:

Marty S. Olson, PLS, TSC ▪ 713.752.8631 ▪ molson@craincaton.com  
Helene L. Wood, PP, PLS, TSC ▪ 713.651.3713 ▪ hwoodpls@fuibright.com

**Ask us about Our Cool Deal for registering for the first 4 seminars in the 2008 series**

#### Registration Deadline

All registrations and checks for seminars must be received seven (7) days in advance of the date of the seminar.  
Refund requests must be in writing and made seven (7) days in advance of the date of the seminar.

### REGISTRATION FORM

**Return registration form/payment to:** Helene Wood, PP, PLS, TSC ▪ 1301 McKinney, Suite 5100 ▪ Houston, Texas 77010

Please register me for the CLE Lagniappe seminar. Enclosed is a check for \$\_\_\_\_\_ made payable to Houston ALP.

Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**TAB 3**

**Super CLE Saturdays 2008-2009  
Sample CLE Certificate**

# HOUSTON ASSOCIATION OF LEGAL PROFESSIONALS

## CERTIFICATE OF ATTENDANCE

*This certifies that*

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*attended a continuing legal education seminar entitled*

### **Texas Civil Litigation (Advanced)**

*October 4, 2008* ■ *Houston, Texas*

- Legal Research—*Speaker: Ethan Carlyle, Esq.—CLE Hours: 1.0*
- Ethics in a Civil Litigation Practice—*Speaker: Michael M. Essmyer, Esq.—CLE Hours: 1.0*
- Working With Your Litigation Services Provider—*Speaker: Joe Cerda (HG Litigation Services)—CLE Hours: 1.0*
- Texas Rules of Civil Procedure—*Speaker: Toby Easley, Esq., and Jeffrey Matthews, Esq.—CLE Hours: 1.50*
  - Texas Rules of Appellate Procedure—*Speaker: Scott D. Ellis, Esq.—CLE Hours: 1.0*
  - Federal Rules of Civil Procedure—*Speaker: Scott D. Ellis, Esq.—CLE Hours: 1.0*
  - Federal Rules of Appellate Procedure—*Speaker: Scott D. Ellis, Esq.—CLE Hours: 1.0*

**Total CLE Hours: 7.5**



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Marty S. Olson, PLS, TSC-RE  
Continuing Education Committee Cochair

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Helene L. Wood, PP, PLS, TSC-RE  
Continuing Education Committee Cochair

**TAB 4-A**

**Super CLE Saturdays 2008-2009—  
Nuts & Bolts of Texas Real Estate  
Sample Handout 1**

# Title Insurance 101

Presented by:

Catlin M. Tucker, Esq.

Business Development

First American Title NCS Houston

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September 6, 2008



First American  
Title Insurance Company  
NATIONAL COMMERCIAL SERVICES

# First American Title

## Overview

- The Nation's leading provider of business information ; founded in 1889
- A fortune 300 Company; NYSE symbol: FAF
- One of America's most admired Companies
- Comprised of 33 companies focusing on Title Insurance & Services, Specialty Insurance; Trust Services; Mortgage, Property, Credit, Automotive and Screening information services
- The leading provider of title insurance nationally and internationally
- Corporate website: [www.firstam.com](http://www.firstam.com)



First American  
Title Insurance Company  
NATIONAL COMMERCIAL SERVICES

# First American Title

## Services

- Title Insurance (Residential and Commercial)
- Escrow and Settlement Services
- Due Diligence Services (Survey, appraisal, zoning, etc.)
- International Title Insurance
- Eagle 9 UCC Insurance (Personal Property)
- 1031 Tax-deferred Exchange Services
- Aircraft/Vessel Title Services
- Much more...



*First American*  
*Title Insurance Company*  
**NATIONAL COMMERCIAL SERVICES**

# First American Title NCS

## National Commercial Services

- Specializing in commercial real estate only
- 3 regions; more than 50 NCS offices across the Country
- Single point of contact responsibility, regardless of property location, number of properties or number of transactional participants
- NCS website: [www.firstam.com/NCS](http://www.firstam.com/NCS)



*First American*  
*Title Insurance Company*  
**NATIONAL COMMERCIAL SERVICES**

# History of Title Insurance

- Title insurance developed in late 1800s
- Designed to replace title abstracts and attorney opinions
- Insured title to property on a “strict liability” standard, avoiding negligence issues
- Provided improved financial viability – many attorneys had insufficient insurance
- Avoided privity of contract issues – some courts did not permit purchasers to sue abstracters
- Title insurers set national standards – important to institutional lenders (numerous local practices previously re: what constituted marketable title)



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# What is Title Insurance?

- Buyers insist upon marketable title (Texas-indefeasible title)
- Lenders demand insurance guaranteeing their lien priorities
- Insurance provides both “cost of defense” and indemnification coverage
- Form of “risk elimination” insurance, although some risks covered on a pure risk basis ®



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# Title Insurance Process

- Order title
- Title plant examines Abstract and prepares Commitment
- Underwriter/Escrow Officer reviews Commitment
- Title company prepares Settlement or Closing Statement
- Title company works with attorneys to “clear title exceptions”
- Escrow Officer compiles Lender Instructions, Closing Instruction Letters from both parties and Signed Settlement Statement so as to serve as the 3<sup>rd</sup> disinterested party with regards to distribution of funds



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# Title Insurance Process Continued...

- Provides “pro forma” policy prior to closing
- Fulfills “escrow” function – wiring funds, etc. (in some parts of the country there are independent escrow offices)
- Records deeds, deeds of trust, UCC’s, etc.
- Provides final title insurance policy to owner & lender



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*Title Insurance Company*  
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# Title Search

- In the West, searches frequently conducted via electronic title plant (Harris County 1970 –present electronic)
- Must contract with a title plant in that county which is licensed to conduct business in that particular county to gain access to information
- In the East, title insurers use employees or, more frequently, independent abstractors who literally do courthouse searches
- Some states are attorneys agent states and we have to rely on an attorney office to do the title search and abstract and prepare commitment
- Most populous jurisdictions use Grantor-Grantee indexes (not by tract or parcel numbers)



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