

OCTOBER SEMINARS



NATIONAL  
SETTLEMENT  
SERVICES  
SUMMIT  

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2010  

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NATIONAL  
COMPLIANCE  
SUMMIT

# EMBRACING EVOLUTION

## **National Settlement Services Summit**

*Tuesday, June 15, 2010*

## **National Compliance Summit**

*Wednesday, June 16, 2010*

Cleveland Marriott Downtown at Key Center  
Cleveland, Ohio

Presented by



Produced by



# NS3 • NCS

# Embracing evolution will drive your future: Learn how at The Summits in Cleveland

It's a new decade, and the housing and mortgage-finance industries are experiencing evolutionary change. This is a critical time for agents to become fully engaged in understanding and assisting their clients as they explore and capitalize on the new paradigms that will emerge.

Produced by October Seminars and presented by TSS Software Corporation, The Summits offer you an opportunity to learn from visionary leaders representing every segment of the industry. Join us June 15-16 in Cleveland to learn about the issues facing your customers, explore the opportunities to expand your business to meet future demand, and craft solutions that will profit you in the new market.

## Here are just a few of the ground-breaking topics that will be addressed at The Summits:

- What is the future of housing in America and where does the title process fit into that reality?
- What solutions are lenders employing to re-establish the health of the finance industry and how can you capitalize on their new focus?
- How are lenders partnering with agents to solve the challenges of the new RESPA rule?
- How can you effectively employ technology to assure your success in the new market?
- What are the elements of sound business planning that will buffer you against adversity?
- What are the three issues you MUST address in the coming year?



## Among the highlights planned for the conference:

- Keynote address by Joe Murin on the state of the housing industry
- Presentation by Pat Stone on the future role of the title agent
- Overview of the latest federal regulatory developments by Phil Schulman
- Update on RESPA implementation and enforcement challenges by Jeff Arouh
- Open forum discussion with state regulators addressing data collection
- The industry's premier Networking Event, held this year at the spectacular RainForest at the Cleveland Metroparks Zoo.

## Monday, June 14

5:00 p.m. to 6:30 p.m.

*Registration/Information Desk Open*

6:30 p.m. to 8:30 p.m.

*Editors' Off-the-Record Reception*

Join the editors of the October Research publications for an evening of candid conversation. It's the perfect opportunity to get an early start on networking with your peers — with cocktails and hors d'oeuvres provided by TSS Software Corporation. You can expect to meet in a strictly *off-the-record* setting with:

**Jennifer Kovacs**, editor of *The Title Report*;  
**Andrea Golby**, editor of *The Legal Description*;  
**Kelly McCarel**, editor of *RESPA News*;  
**David Napuk**, editor of *Valuation Review*;  
**Mark Kuhar**, editorial director;  
**Syndie Eardly**, seminars director; and  
the rest of the **October Research** staff.

## Day 1: The National Settlement Services Summit Tuesday, June 15, 2010

### Morning Sessions

- **Keynote Address — 8:45 - 9:30 a.m.**  
In a freshly unabridged and candid keynote, Joe Murin, former president of Ginnie Mae and founding partner of The Collingwood Group LLC, will outline the issues facing the real estate industry, and assess how a changing regulatory structure is likely to impact the way you do business.
- **Open Forum on the Industry — 9:30 - 10:30 a.m.**  
Joe Murin will be joined by high level industry veterans for a lengthy Q&A session that promises to be frank, insightful and strictly off-the-record! **This session will not be recorded or reproduced in any way, so the only way to hear their exclusive content is to be there!**
- **Best Practices under RESPA — 11:00 a.m. - 12:30 p.m.**  
Dramatic changes to the RESPA rule have been met with equally striking changes to lender/title relationships. A panel of industry experts will share the best practices that are emerging in the new landscape.

### Afternoon Sessions

- **The Future of the Title Agent — 1:30 - 2:15 p.m.**  
Pat Stone, industry veteran and president & CEO of Williston Financial Group, will address the complex issues in the marketplace and what agents must do to adapt and thrive in the new market.

#### Track A — Focus on Agent Business

- **The Business Case for Diversification — 2:15 - 3:30 p.m.**  
Successful entrepreneurs will not only make the case for diversifying your business, financial experts will guide you through the critically important process of determining how to make sure you can profit from any new venture.
- **The Business Case for Technology — 3:45 - 5:00 p.m.**  
The world is going paperless. Don't get left behind! How can you leverage technology to plug into the new dynamics in the marketplace? Experts will walk you through the ROI of technology.

#### Track B — Focus on the National Market

- **National Market/Local Practices — 2:15 - 3:30 p.m.**  
Vendor managers, national agents, and multi-state companies face daily challenges in their efforts to provide services across a wide geographic footprint. Solutions-oriented experts tackle the big issues in the national landscape.
- **Lender Synergies in Today's Market — 3:45 - 5:00 p.m.**  
Join attorney Loretta Salzano, as she leads a frank discussion with lenders from across the country about how they are adapting their businesses for the future, and what their expectations are for their settlement services partners.

[www.octoberseminars.com/ns3](http://www.octoberseminars.com/ns3)

## Day 2: National Compliance Summit Wednesday, June 16, 2010

### Morning Sessions

- **Keynote Address — 8:30 - 9:45 a.m.**  
K&L Gates attorney Phil Schulman will lead off the National Compliance Summit with an in-depth analysis of the plethora of federal laws and regulations that will change the face of the mortgage and settlement services industry.
- **Open Forum on Regulatory Realities — 9:45 - 10:45 a.m.**  
Phil Schulman will be joined by high level thought leaders to take your questions about new and proposed laws and regulations.
- **All Things RESPA — 11:15 a.m. - 12:30 p.m.**  
Holland & Knight attorney Jeff Arouh will walk the audience through the fallout of the new RESPA rule, what legal issues have arisen in the aftermath, and what efforts are afoot at HUD to enforce the new rules.

### Afternoon Sessions

- **Regulator Roundtable — 1:30 - 2:45 p.m.**  
Agents across the country are bracing for the new data requirements being proposed by the NAIC. We will have regulators on tap to enlighten agents about the proposed data calls, explore the efficacy of the monthly HUD enforcement calls, and discuss additional regulatory efforts in their states.

#### Track A — The Closer

- **Managing the Closing Table — 3:00 - 4:00 p.m.**  
The closing table just got a little more complicated! Experienced specialists weigh in on issues surrounding the unauthorized practice of law, fiduciary duty and other new challenges at the closing table.
- **Fraud and the New Ethics — 4:00 - 5:00 p.m.**  
Fraud experts will be on hand to teach agents about the new face of fraud, and how to be an ethical player in the prevention of fraud.

#### Track B — Compliance Issues

- **Marketing Parameters under RESPA and State Law — 3:00 - 4:00 p.m.**  
Marketing your services has never been easy under RESPA, but new rules and regulations at both the state and federal level have added a new level of complexity. RESPA attorneys will walk you through the compliance issues in your marketing practices.
- **Litigation Trends — 4:00 - 5:00 p.m.**  
Plaintiffs attorneys are clever in ferreting out industry practices ripe for litigation. Our expert attorneys will share the latest trends and how you can litigation-proof your agency.

*\*CE and CLE credits will be available in many states.*

For more information, call 877.662.8623

## Here are just a few of the dozens of talented and knowledgeable presenters you can expect to hear at The Summits!



**Jeff Arouh**  
Partner  
Holland & Knight LLP

**Richard Bramhall**  
Chief Title Officer  
Bank of America

**George Holler**  
Attorney and Founder  
Holler Law Firm

**Julie Joseforsky**  
Director of Consumer  
Lending, SVP  
M&I Bank

**Barbara Miller**  
President and Chief  
Operating Officer  
TSS Software Corporation



**Joe Murin**  
Managing Director  
The Collingwood  
Group LLC

NS3 Keynote

**Loretta Salzano**  
Founding Partner  
Franzén & Salzano



**Phil Schulman**  
Partner  
K&L Gates

**Jeff Schurman, CAE**  
Executive Director  
Title Appraisal Vendor  
Management Association

NCS Keynote

**Bob Skalstad**  
President, SCI  
Executive Vice President  
and a Principal of Corporate  
Management Advisors (CMA)



**Pat Stone**  
President and Chief  
Executive Officer  
Williston Financial Group

**David A. Townsend**  
President and CEO  
Agents National Title  
Insurance Company

▶ **Speakers will be added to the agenda daily as we finalize content for the two-day event over the next several weeks.**  
To get an updated list of speakers as well as an in-depth look at the content for each of the sessions, visit [www.octoberseminars.com/ns3](http://www.octoberseminars.com/ns3).

## For the 2010 Summits, the Networking Reception will take place in the lush tropical surroundings of The RainForest at the Cleveland Metroparks Zoo.

With more than 6,000 plants and over 600 animals from the jungles of Asia, Africa and the Americas, The RainForest is a richly diverse, living museum. A roaring 25-foot waterfall, ancient temple ruins and dense foliage will provide an incredibly naturalistic backdrop for the evening's festivities.

Join us in this tropical paradise and network with the industry's best and brightest. Since we've teamed the National Compliance Summit with the National Settlement Services Summit, you can expect even more diverse and productive networking. Rub elbows with independent title agents, national and regional underwriters, corporate counsel, nationally recognized real estate attorneys, top state regulators, settlement technology developers, vendor-management professionals and settlement-services executives, leaders and managers alike.

Once again (by popular demand) gourmet catering will be provided by the incomparable Morton's The Steakhouse. Enjoy the company and your surroundings with full premium bar service and an impressive display of colossal shrimp cocktail, mini crab cakes, filet mignon sandwiches and more.



## YES! I want to attend:

Attendee Type	EARLY BIRD Ends 3/15/2010	REGULAR 3/16/2010 - 6/14/2010	ON-SITE
<b>Full Conference</b> <i>(includes Day 1 &amp; Day 2 Conference, Editors Off-the-Record Reception, and Networking Reception)</i>	<input type="checkbox"/> \$725	<input type="checkbox"/> \$825	<input type="checkbox"/> \$875
<b>Day 1 – Settlement</b> <i>(includes Networking Reception on June 15, 2010)</i>	<input type="checkbox"/> \$525	<input type="checkbox"/> \$575	<input type="checkbox"/> \$650
<b>Day 2 – Compliance</b> <i>(includes Networking Reception on June 15, 2010)</i>	<input type="checkbox"/> \$525	<input type="checkbox"/> \$575	<input type="checkbox"/> \$650
<b>Networking Reception</b> <i>Held at The RainForest at the Cleveland Metroparks Zoo with food catered by Morton's The Steakhouse</i>	<input type="checkbox"/> \$100	<input type="checkbox"/> \$125	<input type="checkbox"/> \$150

**Special Note:** Group discounts are available. Call 877.662.8623 x 6589 for details.

### ATTENDEE CONTACT INFORMATION

Name: \_\_\_\_\_ Name on Badge: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Company: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Mobile: \_\_\_\_\_ E-mail: \_\_\_\_\_  
(Required to receive conference agenda updates and surveys)

### PAYMENT INFORMATION

Visa    American Express    Mastercard    Check enclosed (Payable to October Research Corporation)

Name on card: \_\_\_\_\_  
 Account number: \_\_\_\_\_ Exp: \_\_\_\_\_ CCV number: \_\_\_\_\_  
 Signature: \_\_\_\_\_

CCV are the last 3 digits printed over the signature on the back of your card. American Express cards show the 4-digit CCV printed above and to the right of the imprinted card number on the front of the card.

Credit card billing address (Required only if different than above address)

Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

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► "For information about Summit sponsorship opportunities, please call 330.659.6101 x 6556"

### REGISTRATION IS QUICK AND EASY:

- ▶ **WEB** www.octoberseminars.com/ns3
- ▶ **CALL** 877.662.8623 x6589
- ▶ **FAX** 330.659.6102
- ▶ **MAIL** October Research Corporation  
PO Box 370  
Richfield, OH 44286



**EARLY-BIRD PRICING ENDS MARCH 15!**

#### Accommodations

**MARRIOTT AT KEY CENTER**  
127 Public Square  
Cleveland, Ohio 44114  
Phone: 800.228.9290

October Seminars has secured a block of rooms at a special discounted rate of \$179.00 per night from June 13-16 at the Cleveland Marriott at Key Center. The discounted room rates are available until May 14, 2010. Reservations made after May 14 will be based on availability and current room rates.

To reserve your room, call 800.228.9290 and reference "The Summits" or "National Settlement," or go to the Cleveland Marriott Web page and type "XW64FX" in the group code field to reserve a room at the discounted rate.

The Marriott at Key Center is located in the heart of downtown Cleveland, Ohio within easy walking distance to museums, sports stadiums, restaurants and entertainment. The 400-room hotel is connected to the KeyBank Tower. Rising 25 stories above the city, you'll enjoy breathtaking views of Lake Erie and the Cleveland skyline.

#### Cancellations & Refunds

Cancellations, refund requests and requests to substitute attendees can be e-mailed to our Customer Service Department at [custserv@octoberresearch.com](mailto:custserv@octoberresearch.com) or faxed to 330.659.6102. Please see the refund schedule below:

- Received on or before 30 days prior to event: Full refund minus \$100 processing fee (May 16, 2010)
- Received on or before 14 days prior to event: Refund of 50 percent of the registration fee (May 17, 2009 to June 2, 2010)
- Received 13 or fewer days prior to the event: No refund (June 3, 2010 and after)
- The cancellation & refund policy is based on the event date that the customer originally registered to attend

#### Program Cancellation

In the unlikely event of program cancellation, October Research Corporation will refund 100 percent of registration fees paid. October Research Corporation assumes no liability for any penalty fees on airline tickets, deposits for hotel accommodations, or any other fees, charges, penalties or other incidental costs that a registrant might incur as a consequence of a program cancellation.