

California Escrow Association

Board of Directors Meeting

August 17 & 18, 2007

Costa Mesa

Donna J Inman, CSEO, CEI

EASGV Additional Director

Professional Designation and Continuing Education Committee	Education Committee
<p>The Friday work session had three people in attendance and two of the attendees were from EASGV – me and Juliana Tu. We worked on the online sample exams for professional designation – found some errors, found some items we need to investigate further, and had plenty of discussion.</p> <p>The highlights from the Saturday committee meeting include:</p> <p>Progress has been made in getting the proctor training material online at the CEA web site.</p> <p>CET test has been corrected and should be available for use in January 2008.</p> <p>Working with the Education Committee on guidelines for entities (including escrow associations), other than colleges, to receive credit for teaching Escrow I, II and III courses. The criteria have been submitted to the Executive Committee for review.</p> <p>The updating of the CEO and CSEO professional designation exams utilizing the CAR Purchase Agreement is a work in progress.</p> <p>Discussion on the current practice of headquarters mailing the PD awards directly to the recipients. Many of the regional associations are not happy with this procedure and feel that the awards should be sent to the regional professional designation chair or the regional president. More to follow.</p>	<p>Progress is being made on the revisions to the Escrow I and Escrow II manuals. As well as the Escrow III manual.</p> <p>We are adding a chapter to the Escrow II manual on Judgments and Liens. If you have material that may be helpful, please send it to, as soon as possible, as I am working on this chapter.</p> <p>We worked on the forms and guidelines for CEA – Industry Provider Course and Instructor Requirements. The forms have been submitted to the Executive Committee for review and approval.</p> <p style="text-align: center;">⇌ ⇌ ⇌</p> <p style="text-align: center;">AEA/PREP Committee</p> <p>Congratulations to Carolyn Marcial! She was elected to the office of 3rd Vice President of the American Escrow Association at the June Annual Conference.</p> <p>Money making ideas to support the committees’ efforts were discussed.</p> <p>The committee is working with the web site liaison to update the CEA website materials and make the information easier to find.</p> <p>AEA is discussing a name change – your input is requested.</p> <p>CEA will be the ‘Host’ state for AEA’s 2008 Annual Conference in Washington, DC. We are looking for educational session suggestions and sponsorship opportunities.</p>

Highlights from the Board Meeting Luncheon

Elections were held for the 2008 Officers and Portfolio Chairs.

The results are:

President: Deb Perry, CSEO, High Desert Escrow Association

President-Elect: Kathy Lozano, CSEO, East Bay Escrow Association

Vice President: Donna Grosso, CSEO, Orange County Escrow Association

Secretary-Treasurer: Rosanna Medeiros, CSEO, Central Coast Escrow Association

Portfolio Chair Education: Sara Rogers, CSEO, Central Valley Escrow Association

Portfolio Chair Legislation: Lena Signor, CSEO, Escrow Association of Santa Clara Valley

Portfolio Chair Membership: Lexi Howard, CSEO, Ventura County Escrow Association

Portfolio Chair Professional Designation: Tamara Stoebe, CSEO, Escrow Associates of Antelope Valley

Portfolio Chair National Affairs: Phyllis Yanagihara, CSEO, Escrow Associates of Antelope Valley

We also voted on changes to CEA's bylaws, Article II – Membership, Section 1: Qualification of Membership: we added an *Individual Associate Membership* category and made changes to the *State Membership – Associate*. CEA's bylaws are available on the CEA web site.

Ryan Caplette of EASGV attended this board of directors meeting as a guest. Ask him about his day at CEA!

It is a pleasure and an honor to serve as your CEA Director – thank you!

Donna Inman