

2001 TITLE UNDERWRITING 1

ATTORNEYS'
TITLE
GUARANTY
FUND,
INC.

Thursday, March 14, 2001

Holiday Inn East
3841 East Washington Avenue
Madison, WI 53704
608.244.2481

Friday, May 11, 2001

Radisson Hotel
2040 Airport Drive
Green Bay, WI 54313
920.494.7300

Thursday, March 22, 2001

Country Inn & Suites
2810 Golf Road
Pewaukee, WI 53072
262.547.0201

Wednesday, September 12, 2001

Holiday Inn
205 South Barstow Street
Eau Claire, WI 54701
715.835.6121

Wisconsin Programs:

Registration/Continental Breakfast: 8:00 - 8:30 a.m.
Program: 8:30 - noon

WHAT YOU WILL LEARN:

This program will cover some of the basic issues confronting title examiners and underwriters. We will examine how the nature of the person or entity in title affects underwriting requirements, how to "cure" particular title defects arising from lack of authority to convey, foreclosure, unprobated estates, and more. Topics include the following:

- Requirements for conveyances by an entity (corporation, LLC, trust, partnership, church association);
- Insuring title for land contract purchasers;
- How co-ownership (joint tenancy, tenants in common, etc.) affects title;
- Title considerations for condominiums;
- Pre- and post-foreclosure issues;
- Zoning: Policy exclusions and endorsements;
- Guardianship and estate property; and
- Disposition and effect of various liens.

WHO SHOULD ATTEND:

This program will be of interest to anyone involved in real estate transaction: attorneys, legal assistants, title examiners, and closing personnel. This program qualifies for 3.5 CLE credit hours in Wisconsin and toward the attorney title insurance license requirement under Ins. 6.59(4)(av).

Total CLE requirement is six hours (contact our Madison office for more information). **There is NO CHARGE for ATG members and their employees; \$25 per person for all others.**

ABOUT THE SPEAKER:

JAMES E. POWERS, Managing Attorney - Wisconsin Operations, Madison, Wisconsin | Before joining the ATG legal staff, Mr. Powers practiced law in Marshfield, Wisconsin, concentrating on real estate, estate planning, and small business representation. He recruits, trains, and provides underwriting, administrative, and marketing support to ATG's Wisconsin members. He also conducts many of our Wisconsin seminars. Mr. Powers is a member of the State Bar of Wisconsin and serves on the Sole and Small Firm Practice Committee. He is also a member of the Dane County Bar Association and the American Bar Association. *Marquette University, J.D. 1991; U.C.L.A., B.A. 1976.*

**EARN 3.5 CLE CREDITS
AND ATTORNEY TITLE
INSURANCE LICENSE
REQUIREMENT CREDITS!
CALL 800.788.8989 FOR
MORE INFORMATION.**

2001 PROGRAM DESCRIPTIONS

ATTORNEYS'
TITLE
GUARANTY
FUND,
INC.

FUNDAMENTALS OF ESTATE PLANNING[†]

(a Guaranty Trust Company program)

To Be Held In: ☒ Illinois ☐ Indiana ☐ Wisconsin

3/7: Oak Brook | 3/13: Peoria | 3/21: Collinsville

WHAT YOU WILL LEARN: This program covers federal estate taxation, the credit shelter trust, generation skipping tax, revocable living trusts, life insurance trusts, charitable giving and other basic techniques to minimize estate tax exposure. Practical issues will be stressed, such as how to effectively relate to clients and the use of forms and checklists.

WHO SHOULD ATTEND: Lawyers who desire either to obtain a basic knowledge of the fundamentals of estate planning or who wish to refresh their expertise in certain areas. There is **no charge** for this program.

HELP CLIENTS BUILD WEALTH: §1031 TAX-DEFERRED (STARKER) EXCHANGES

To Be Held In: ☒ Illinois ☒ Indiana ☒ Wisconsin

IL 3/15: Bloomington | 3/22: Huntley | 4/17: Peoria | 9/11: Oak Brook

WI 4/20: Milwaukee | 6/7: Wausau | 6/8: Eau Claire

IN 9/13: Evansville

WHAT YOU WILL LEARN: Starker exchanges are one of the few remaining tax incentives for people of virtually any income level. Learn the basic elements of a tax-deferred exchange of real estate. Go step-by-step through the process so you can help your clients defer paying taxes on the gains they have earned from their investment property. **Update: The IRS has approved reverse exchanges – learn how this affects you.**

WHO SHOULD ATTEND: Real estate or estate planning attorneys, legal secretaries, paralegals, legal assistants, and real estate salespeople. **No charge** for ATG members and their employees; \$25 per person for all others.

EDUCATION CREDITS: This program qualifies for 3.5 CLE credit hours in Wisconsin. We have applied for CLE and CIE credits in Indiana.

THE REAL ESTATE CLOSING: DOCUMENT PREPARATION AND IMPORTANT CLOSING ISSUES

To Be Held In: ☐ Illinois ☐ Indiana ☒ Wisconsin

4/5: Pewaukee | 4/26: Madison

WHAT YOU WILL LEARN: This program teaches attendees the myriad steps involved in preparing and conducting a real estate closing. It includes a discussion of closing problems, their solutions, and tips to ease closing hassles, lender documents, mortgage payoffs, insured closing letters, §1099 reporting, and more.

WHO SHOULD ATTEND: Lawyers, paralegals, legal assistants, secretaries, and any other employees who deal with or prepare forms and other documents for closings. **No charge** for ATG members and their employees; \$25 per person for all others.

EDUCATION CREDITS: This program qualifies for 3.5 CLE credit hours.

TITLE INSURANCE FUNDAMENTALS

To Be Held In: ☒ Illinois ☒ Indiana ☒ Wisconsin

WI 3/8: Milwaukee | 3/13: Madison | 5/10: Green Bay

IL 4/12: Oak Lawn | 5/9: Peoria | 10/2: Oak Brook | 10/11: Collinsville

IN 4/18: Merrillville | 9/13: Evansville

WHAT YOU WILL LEARN: This program focuses on title insurance policy coverage and closing documents. Topics include the significance of the commitment, Owner policy, and Mortgagee (Lender) policy; basic closing documents (checklists, deeds, loan documents, and more), and commonly used affidavits and endorsements.

WHO SHOULD ATTEND: All ATG member attorneys, non-member attorneys, and their paralegals, legal assistants, secretaries, and closers to attend. **No charge** for ATG members and their employees; \$25 per person for all others.

EDUCATION CREDITS: This program qualifies for 3.5 CLE credit hours and toward the attorney title insurance license requirement in Wisconsin. We have applied for CLE and CIE credits in Indiana.

[†]Full-day program, includes lunch

2001 PROGRAM CALENDAR

ATTORNEYS'
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INC.

This calendar is based on the information available at press time; details are subject to change. Please watch future mailings or visit our website, www.atgf.com, for updated information and on-line registration.

MONTH	STATE	DAY/DATE	PROGRAM TITLE	TIME	FACILITY/CITY
March	IL	Thu, 3/15	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges	8:30 a.m. - noon	Jumer's Chateau 1601 Jumer Drive Bloomington, IL 61704 309.662.2020
	IL	Wed, 3/21	Fundamentals of Estate Planning (a Guaranty Trust Company program)	8:30 a.m. - 4:00 p.m.	Holiday Inn 1000 Eastport Plaza Drive Collinsville, IL 62234-6103 618.345.2800

WI	Thu, 3/22	Title Underwriting 1	8:00 a.m. - noon	Country Inn & Suites 2810 Golf Road Pewaukee, WI 53072 262.547.0201
IL	Thu, 3/22	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges <i>(co-sponsored by Guaranty Trust Company and Northland Title LLC)</i>	8:30 a.m. - noon	Del Webb's Sun City - Prairie Lodge 12860 Del Webb Boulevard Huntley, IL 60142 847.515.7344

April	WI	Thu, 4/5	The Real Estate Closing	8:00 a.m. - noon	Country Inn & Suites 2810 Golf Road Pewaukee, WI 53072 262.547.0201
	IL	Thu, 4/12	Title Insurance Fundamentals - Illinois	8:30 a.m. - noon	Oak Lawn Hilton Cicero Avenue at 94th Street Oak Lawn, IL 60453 708.425.7800
	IL	Tue, 4/17	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges	8:30 a.m. - noon	Hotel Pere Marquette 501 Main Street Peoria, IL 61602 309.637.6500
	IN	Wed, 4/18	Title Insurance Fundamentals - Indiana	8:30 a.m. - noon	Radisson Hotel at Star Plaza 800 East 81st Street Merrillville, IN 46410 219.769.6311
	WI	Fri, 4/20	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges	8:00 a.m. - noon	Wyndham Hotel 139 East Kilbourn Avenue Milwaukee, WI 53202 414.276.8686
	WI	Thu, 4/26	The Real Estate Closing	8:00 a.m. - noon	Radisson Hotel 517 Grand Canyon Drive Madison, WI 53719 608.833.9501

May	IL	Wed, 5/9	Title Insurance Fundamentals - Illinois	8:30 a.m. - noon	Hotel Pere Marquette 501 Main Street Peoria, IL 61602 309.637.6500
	WI	Thu, 5/10	Title Insurance Fundamentals - Wisconsin	8:00 a.m. - noon	Radisson Hotel 2040 Airport Drive Green Bay, WI 54313 920.494.7300
	WI	Fri, 5/11	Title Underwriting 1	8:00 a.m. - noon	Radisson Hotel 2040 Airport Drive Green Bay, WI 54313 920.494.7300

June	WI	Thu, 6/7	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges	8:00 a.m. - noon	Park Inn 2101 North Mountain Road Wausau, WI 54401 715.842.0711
	WI	Fri, 6/8	Help Clients Build Wealth: §1031 Tax-Deferred (Starker) Exchanges	8:00 a.m. - noon	Holiday Inn 205 South Barstow Street Eau Claire, WI 54701 715.835.6121

TITLE UNDERWRITING 1

ATTORNEYS' TITLE GUARANTY FUND, INC.
EDUCATIONAL PROGRAMS

EARN 3.5 CLE CREDITS AND
ATTORNEY TITLE INSURANCE
LICENSE REQUIREMENT
CREDITS IN WISCONSIN!



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P.O. Box 9136
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TITLE UNDERWRITING 1

Please complete this form and mail/fax it to Ginny Herale, Wisconsin Registrar, ATG, 559 D'Onofrio Drive, Madison, WI 53719-2808, Fax: 608.827.5688. You can also register on line at www.atgf.com. Questions? Call Ginny at 800.788.8989.

Name: _____ Firm: _____ Mbr No.: _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: (_____) _____ E-mail: _____

Attendees: _____

☐ 3/14: Madison ☐ 3/22: Pewaukee ☐ 5/11: Green Bay ☐ 9/12: Eau Claire

Enclosed is my non-member fee (if applicable): Total Attendees _____ @ \$25 per person per program = \$ _____ ☐ Send me information about ATG membership

Please send registration information on the following program(s): _____ Date/Location: _____

