



## Limited Practice Officer Refresher Course

THURSDAY, MARCH 26, 2026

Approved for 7.0 CLE credits  
(4.25 Law & Legal Procedure + 1.75 Ethics + 1.0 Other)  
\$275 - Standard

Washington State Bar Association  
1325 Fourth Ave., Suite 600 | Seattle, WA 98101

WEBCAST  
ONLY

### 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.

#### FACULTY

**Holly Haines** - *CW Title and Escrow, Bellevue*

**Dean Alterman** - *Alterman Law Group PC, Portland, OR*

**Steven Bender** - *Seattle*

*University School of Law, Seattle*

**Holly Surface** - *Des Moines Elder Law, Des Moines*

**Saphronia R. Young** - *Des*

*Moines Elder Law, Des Moines*

**Sandra Schillings** - *Washington State Bar Association, Seattle*

### SCHEDULE

**8:40 a.m. > Webcast Log-In Opens**

**8:55 a.m. > Welcome and Introductions**

- **Jennifer Holderman** - *Washington State Bar Association, Seattle*

**9:00 a.m. > Selecting, Preparing and Completing Limited Practice Board Approved Forms**

*90 minutes, 1.5 credits L&LP*

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*

**10:30 a.m. > How the Bar Can Help?**

*75 minutes, 1.0 credits Ethics and .25 Other*

Sandra Schillings, 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*
- **Holly Haines** - *CW Title and Escrow, Bellevue*

**11:45 a.m. > LUNCH**

**12:45 p.m. > Limited Practice Office Scope of Practice, Rules of Professional Conduct and Standard of Care**

*45 minutes, 0.75 credits Ethics*

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*

**1:30 p.m. > The (Title) Problems with Probates** (*RECORDED from 24711 True to Life Title Issues on Tuesday, January 23, 2024*)

*60 minutes, 1.0 credits L&LP*

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 Haines** - *CW Title and Escrow, Bellevue, WA*
- **Saphronia R. Young** - *Des Moines Elder Law, Des Moines, WA*

# WSBA CLE #26866 WEB

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**Dean Alterman** - *Alterman Law Group PC, Portland, OR*

**Steven Bender** - *Seattle University School of Law, Seattle*

**Holly Surface** - *Des Moines Elder Law, Des Moines*

**Saphronia R. Young** - *Des*

*Moines Elder Law, Des Moines*

**Sandra Schillings** - *Washington State Bar Association, Seattle*

## SCHEDULE

### 2:30 p.m. > Building Your Network, Your Reputation, and Your Practice

*45 minutes, 0.75 credits Other*

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*

### 3:15 p.m. > BREAK

### 3:30 p.m. > Avoiding the Pitfalls of Seller Financing

*45 minutes, 0.75 credits L&LP*

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*

### 4:15 p.m. > How to Read and Respond to a Title Report

*60 minutes, 1.0 credits L&LP*

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*

### 5:15 p.m. > Adjourn • Complete Online Evaluations

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Thursday, March 26, 2026 • #26866 WEB

## REGISTRATION

To register online, please go to the [registration page](#). Click to add to cart and complete your purchase. You may pay by credit card, or via ACH. Alternatively, you may print and mail an invoice seven business days prior to the program along with your check payable to WSBA. Credit card payments by mail or fax are no longer accepted. Note, our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.

Effective Oct. 1, 2025, applicable sales tax will be applied to all live seminar registrations (in-person or virtual). For more information, refer to changes to [Washington sales tax law](#).

If special accommodations are needed, please email [cle@wsba.org](mailto:cle@wsba.org) or call toll-free at 1-800-945-9722.

Please omit my name from the networking list made available to exhibitors and/or attendees.

## PRICING INFORMATION

**#26866 WEB, attend via webcast, 3/26/26**

\$275 - Standard/Non-Section Members

### Seminar Registration Transfers, Refunds and Cancellations

In most circumstances, if you cannot attend the live event, we can transfer your registration to the on-demand product, once available (8-10 weeks from the program delivery date). Generally, for webcast/webinar registrations, tuition fees may be refunded, less \$25 for processing, for written cancellations postmarked, emailed, or faxed up to the start of the event. For in-person registrations, tuition fees may be refunded, less \$25 for processing, for written cancellations postmarked, emailed, or faxed by 5 p.m. up to three business days before the event. No refunds will be provided after the dates specified. You may also send a substitute in lieu of canceling. *When applicable, specific exceptions to these policies will be noted on individual event registration pages.* Please email [cle@wsba.org](mailto:cle@wsba.org) with any requests or questions.

**ONLINE >** Go to [www.wsba.org](http://www.wsba.org) and enter **26866** in the search box. Payment by credit card.

**PHONE >** Call **800-945-9722** or **206-443-9722** with credit card and registration/order form in hand. Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.