

# Marking Up Title Commitments, Eliminating Exceptions & Getting Endorsements

*How to skillfully fine-tune a residential and commercial real estate title insurance policy*

The ability to facilitate real estate closings and procure title insurance for buyers and lenders is a necessary skill in today's real estate market. Title examination, analysis, risk assessment, and mitigation are all key elements in determining whether and how to insure a transaction, what endorsements may be needed and whether they can be issued, and satisfying the insurer's requirements to obtain the desired title insurance coverage.

This nuts-and-bolts program guides you through the practical aspects of preparing and reviewing a title commitment to producing the final policy with appropriate endorsements to enhance the policy's coverage. Topics include reading and understanding a title report, curing title problems, satisfying requirements, identifying and drafting relevant exceptions, and adding requested coverage to the policy via endorsements, with an emphasis on typical underwriting requirements for common commercial endorsements. The panel features both title insurance underwriting counsel and the lender's counsel perspective. Attorneys and paralegals alike benefit from attending this program.

## Agenda

- The Basics of Title Insurance and Policy Options
- The Title Search and Attorney's Title Review
- Preparing the Title Commitment
- Commitment Review in the Residential v. Commercial Transaction
- Common Transactional Requirements and Exceptions
- Satisfying Requirements and Removing Exceptions
- Common Endorsements
- The Pro Forma Policy in a Commercial Transaction
- Issuing the Final Policy
- "Ask the Experts" Q&A Session

## Faculty

Jutta R. Deeney, Esq., *Vice President and New England Regional Underwriting Counsel and Senior Underwriter, Stewart Title Guaranty Company, Waltham, Chair*

Amanda S. Eckhoff, Esq., *Robinson + Cole LLP, Boston*

Tracie M. Kester, Esq., *Massachusetts State Underwriting Counsel, and Associate Senior Underwriter, Stewart Title Guaranty Company, Waltham*



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## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Thursday, April 4, 2024

9:00 am–12:00 pm

Program # 2240150WBC

### REBROADCAST

Friday, April 19, 2024

9:30 am–12:30 pm

Program # 2240150RB1

### REBROADCAST

Monday, April 29, 2024

1:00 pm–4:00 pm

Program # 2240150RB2

### ON DEMAND WEBCAST

View after Monday, April 29, 2024

Program # 2240150WBA

## Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

## Materials

*Real Estate Title Practice in Massachusetts* ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

## CLE Credits

Earn up to 3 CLE credits

