

REBA 2022 SPRING CONFERENCE

Luncheon Keynote Speaker

STEPHEN PULEO

Author and Historian



Puleo returns to the REBA conference podium after a well-received luncheon keynote address at the Association's 2018 Spring Conference. A prolific author, historian, educator and public speaker, his recent books include *Voyage of Mercy: The USS Jamestown, the Irish Famine, and the Remarkable Story of America's First Humanitarian Mission*; *American Treasures*; and, *The Caning: The Assault That Drove America to Civil War*.

Puleo's other books include *A City So Grand: The Rise of an American Metropolis, Boston 1850-1900*; *The Boston Italians: A Story of Pride, Perseverance and Paesani, from the Years*

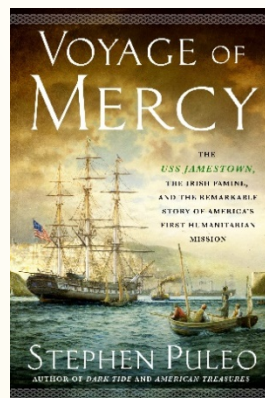
of the Great Immigration to the Present Day; *Due to Enemy Action: The True World War II Story of the USS Eagle 56*; and *Dark Tide: The Great Boston Molasses Flood of 1919*. He donates a portion of his book proceeds to the Juvenile Diabetes Research Foundation (JDRF).

A former award-winning journalist and contributor of feature stories and book reviews to *American History* magazine and the *Boston Globe*, Puleo has made more than 600 author appearances. Steve holds a master's degree in history from UMass-Boston and has taught at Suffolk University and, most recently, UMass-Boston. He resides with his wife, Kate, south of Boston.

Voyage of Mercy: The USS Jamestown, the Irish Famine, and the Remarkable Story of America's First Humanitarian Mission

In his latest book, *Voyage of Mercy*, Puleo details the remarkable story of the mission that inspired America to donate massive relief to Ireland during the potato famine, which sparked America's tradition of providing humanitarian aid around the world.

Voyage of Mercy tells the incredible story of the famine, the Jamestown voyage, and the commitment of thousands of ordinary Americans to offer relief to Ireland, a groundswell that provided the collaborative blueprint for future relief efforts, and established the United States as the leader in international aid.



Conference registration enclosed ♦ Register online at www.reba.net

BREAKOUT SESSIONS

Revamped: Self-Dealing & Trustee Certificates After MUTC & MUPC

Ethical Issues Concerning Elder Abuse in Real Estate Transactions

Siting Cannabis Establishments: Case Law Update, Insights and Legislative Primer on Recent Trends in Municipalities

Representing Condo Buyers and Mortgagees: Conditions Assessment and Due Diligence After the Surfside Tragedy

Push Button, Get Notary: Can Massachusetts Learn to Love Remote Online Notarization?

Recent Developments in Massachusetts Case Law

Practical Skills Sessions

How to Handle and Mediate Partition Cases in the Land Court

Dos & Don'ts of Drafting Grantor, Grantee and Acknowledgement Clauses for Trusts, Entities and Fiduciaries

Current Status and Challenges of Registration Withdrawal

Building Your Law Practice: Teaching First-time Home Buyer Courses

EXHIBITORS & SPONSORS

For more information, contact Nicole Cohen at cohen@reba.net or call (617) 854-7555.

REBA CONTINUING EDUCATION SECTION

Kimberly A. Bielan, Co-chair
Elizabeth J. Young, Co-chair

QUESTIONS?

For questions, contact REBA at (617) 854-7555, admin@reba.net or online at www.reba.net.

Four Points by Sheraton
1125 Boston-Providence Tpke, Norwood

Monday, May 2, 2022
7:30 AM – 2:45 PM

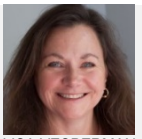
SCHEDULE OF EVENTS

7:30 AM - 8:30 AM	Registration and Exhibitors' Hour
8:30 AM - 1:15 PM	BREAKOUT SESSIONS (<i>see descriptions below</i>)
1:20 PM	LUNCHEON PROGRAM
1:20 PM - 1:35 PM	Opening Remarks from President Kendra L. Berardi
1:35 PM - 2:05 PM	REBA Business Meeting, Reports and Award Presentation
2:05 PM - 2:25 PM	Luncheon Keynote Address by Author/Historian Stephen Puleo
2:25 PM - 2:45 PM	Concluding Remarks
2:45 PM	Adjournment

8:30 AM - 9:30 AM	TIFFANY BALLROOM A
9:45 AM - 10:45 AM	TIFFANY BALLROOM A



CHRISTINE M. PROVOST



LISA VESPERMAN STILL

Revamped: Self-Dealing and Trustee Certificates After the MUTC and MUPC

Take an in depth look at the revisions to REBA Title Standards 23 and 68. See how the uniform codes have broadened the use of statutorily compliant trustee certificates and clarified what constitutes self-dealing. They will explain how the title standards have changed as a result. Lisa and Chris will discuss the standards and offer examples to demonstrate what to do and not to do in the record title when holding property in trust.

8:30 AM - 9:30 AM	TIFFANY BALLROOM B
11:00 AM - 12:00 PM	CONFERENCE ROOM 103



PATRICIA KEANE MARTIN



DONNA A. MIZRAHI

Ethical Issues Concerning Elder Abuse in Real Estate Transactions

This session will address the ethical issues arising in real estate transactions involving older clients at risk of elder abuse. The panelists will discuss how a lawyer should handle real estate transactions, including the purchase and sale of residential properties, reverse mortgages for seniors, etc., involving a senior who appears diminished or vulnerable to exploitation. The speakers will also identify red flags to detect potential cases of abuse, and cover what processes and resources are available to address these issues, as well as the lawyer's obligations in these situations.

8:30 AM - 9:30 AM	CONFERENCE ROOM 101
11:00 AM - 12:00 PM	CONFERENCE ROOM 104



JULIE P. BARRY



ADAM D. FINE

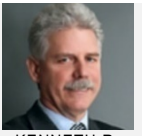
Siting Cannabis Establishments: Case Law Update, Insights and Legislative Primer on Recent Trends in Municipalities

The panelists will discuss recent case law and provide a legislative primer on the siting of Massachusetts marijuana establishments. The panel will focus on the latest trial and appellate decisions, as well as proposed Massachusetts legislation to address recent developments in cannabis law. In addition, they will discuss their insights and experience in siting cannabis facilities in various municipalities throughout the Commonwealth.

9:45 AM - 10:45 AM	CONFERENCE ROOM 101
11:00 AM - 12:00 PM	CONFERENCE ROOM 101



THOMAS O. MORIARTY



KENNETH R. QUIGLEY

Representing Condominium Buyers and Mortgagees: Conditions Assessment and Due Diligence After the Surfside Tragedy

The catastrophic Surfside Condominium collapse has significantly impacted the condo industry. There is far greater awareness of, and focus on, issues related to the structural condition of the common areas. Unit owners are more concerned about the safety risks and financial exposures posed by deteriorating structures. Lenders are more cognizant of the risks posed by collapse and impacts on their collateral. Fannie and Freddie have revised their condo lending guidelines by imposing additional conditions on project approval. This program will explore due diligence in a post-Surfside environment from both an engineering and legal perspective, and will give the practitioner a more in-depth understanding of the practical and legal realities in approaching due diligence issues.

SCHEDULE OF EVENTS

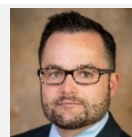
9:45 AM - 10:45 AM | TIFFANY BALLROOM B

11:00 AM - 12:00 PM | TIFFANY BALLROOM B

Push Button, Get Notary:

Can Massachusetts Learn to Love Remote Online Notarization?

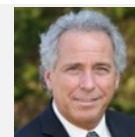
Remote Online Notarization (RON) is now legal in more than 40 states. However, no “attorney-closing” state has implemented RON. Could Massachusetts be the first? This session explores and describes what remote online notarization, or RON, would look like in practice in Massachusetts. The panelists will explain what RON is, why so many lenders want it implemented universally and how it could benefit Massachusetts conveyancers. They will also discuss how RON legislation in Massachusetts might include safeguards to protect consumers and ensure that lawyers maintain a meaningful oversight role in real estate closings. The future is now – make sure you’re fully informed!



TUCKER
DULONG



FRANCIS J.
NOLAN



JOHN V.
FERNANDES

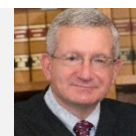
8:30 AM - 9:30 AM | CONFERENCE ROOM 103

9:45 AM - 10:45 AM | CONFERENCE ROOM 103

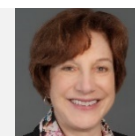
► Practical Skills Session

How to Handle and Mediate Partition Cases in the Land Court

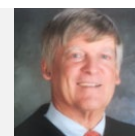
In fiscal year 2021, nearly 100 partition cases were filed in the Land Court, as it is the preferred venue for partition actions. Two of our panelists, Chief Justice Gordon H. Piper and Associate Justice Diane R. Rubin, will describe the common circumstances of family disputes leading to partition, and explain the basics of G.L. c.241. Our third panelist, retired Land Court Judge Alexander H. Sands, will share his experiences mediating and settling dozens of partition cases.



CHIEF JUSTICE
GORDON H. PIPER



HON DIANE R.
RUBIN



HON ALEXANDER H.
SANDS III (ret)

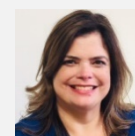
8:30 AM - 9:30 AM | CONFERENCE ROOM 104

9:45 AM - 10:45 AM | CONFERENCE ROOM 104

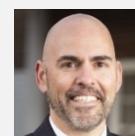
► Practical Skills Session

Dos and Don'ts of Drafting Grantor, Grantee and Acknowledgement Clauses for Trusts, Entities and Fiduciaries

The drafting of documents in real estate transactions involving trusts, corporate entities and fiduciaries can present any number of issues and requirements. This session will review the fundamentals of conveyances by corporate entities, including LLCs, corporations and partnerships, as well as fiduciaries, with a focus on when to use a notary clause or a jurat, how to draft required documents with formats acceptable in Massachusetts, review Land Court requirements and avoiding common traps for the unwary.



LYNNE MURPHY
BREEN



SCOTT J.
CLIFFORD

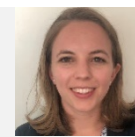
8:30 AM - 9:30 AM | ESSEX / LENOX ROOM

9:45 AM - 10:45 AM | ESSEX / LENOX ROOM

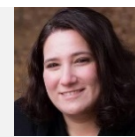
► Practical Skills Session

Current Status and Challenges of Registration Withdrawal

The panel will discuss the benefits of voluntary withdrawal from registered land, as well as the current status and challenges of this process in both Massachusetts and other states. They will review recently-adopted/pending legislation in other states related to the Torrens System and present findings based on a statistical analysis study of all voluntary withdrawal petitions filed in the Massachusetts Land Court from 2014 to 2020. The speakers will also discuss recommended practices for filing a withdrawal and under which statutory clause to



MADELEINE
LAFFITTE



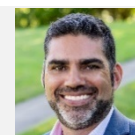
CARRIE B.
RAINEN

11:00 AM - 12:00 PM | ESSEX / LENOX ROOM

► Practical Skills Session

Building Your Law Practice: Teaching First-time Home Buyer Courses

Presenting a first-time home buyer's course can be a great way to educate buyers and also generate new business. However, how do you actually conduct one and present the complicated legal process of buying a home in a streamlined and digestible manner? Join Attorney Elizabeth Vacca and Realtor Rodrigo Serrano as they provide you with content, tips and tricks to make your first-time home buyer courses a success, while avoiding possible pitfalls.



RODRIGO
SERRANO



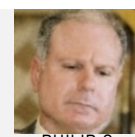
ELIZABETH K.
VACCA

12:15 PM - 1:15 PM | CONFERENCE ROOM 103

Video Simulcasts | CONFERENCE ROOMS 101 & 104

Recent Developments in Massachusetts Case Law

Now in his forty-fourth year as case commentator at REBA's twice-yearly conferences, Phil Lapatin continues to draw a full house with this session. Attending his twice-yearly presentations are a must for any practicing real estate lawyer. Phil is the 2008 recipient of the Association's highest honor, the Richard B. Johnson Award.



PHILIP S.
LAPATIN

REBA 2022 SPRING CONFERENCE

REGISTRATION

To register, complete this form and return it with payment to:
REBA Foundation, 295 Devonshire Street, Sixth Floor, Boston, MA 02110
You may also register by phone at 617.854.7555 or online at www.reba.net.

	<i>By April 25</i>	<i>After April 25</i>
<input type="checkbox"/> Register me as a REBA member in good standing:	\$ 250	\$ 275
<input type="checkbox"/> Register me as a non-REBA member guest:	\$ 290	\$ 315
<input type="checkbox"/> I would like to purchase the conference syllabus:	\$ 200	\$ 200

☐ CHECK

Payable to *REBA Foundation*

Check No.: _____

Date: _____

☐ CREDIT CARD

Card No.: _____

Exp Date: _____

Signature: _____ Date: _____



Registrant Information

Full Name: _____ Call Name (for nametag): _____

Company: _____

Address: _____ City, State ZIP: _____

Phone: _____ ☐ Mobile ☐ Work Email: _____

Luncheon Entrée Selection

- ☐ **Marinated Steak Tips** | *Whipped Potato, Roasted Vegetable with a Red Wine Demi Glaze*
- ☐ **Chicken Milanese** | *Herb-Encrusted Chicken Breast, Parmesan Breadcrumbs and Lemon Velouté*
- ☐ **Portabella Tower** | *Roasted Red Pepper, Zucchini, Squash and Quinoa with a Balsamic Glaze (GFV)*
- ☐ **Not Eating at Luncheon** | *I am attending the luncheon, but will not be eating*
- ☐ **Not Attending Luncheon** | *I am unable to attend the conference luncheon*

REBA's 2022 Spring Conference welcomes both members and non-members. The registration fee includes the breakout sessions, luncheon and conference syllabus. Register via mail, phone or online at www.reba.net; submit one registration per attendee. Registration will be confirmed by email. REBA cannot offer discounts for registrants who attend only part of the conference. To guarantee a reservation, please send your registration with the appropriate fee on/before April 25, 2022. Registrations received after April 25, 2022 will be subject to a late registration fee of \$25. Registrations cancelled in writing on/before April 25, 2022 will be subject to a processing fee of \$25. Registrations cannot be cancelled after April 25, 2022; however, we welcome substitutions of registrants attending the program. Conference materials will be mailed to non-attendee registrants. For questions regarding continuing legal education (CLE) credits, contact Bob Gaudette at (617) 854-7555 or at gaudette@reba.net. Kindly refrain from cell phone use during the breakout session presentations and conference luncheon.

Four Points by Sheraton
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