

# REBA 2018 SPRING CONFERENCE

Tuesday, May 1, 2018

7:30 AM – 2:45 PM

Four Points by Sheraton  
1125 Providence Turnpike  
Norwood, MA

Luncheon Keynote Address Presented By

## Stephen Puleo



PULEO returns to the REBA conference podium after a well-received luncheon keynote address at the 2014 Spring Conference. A prolific author, historian, university teacher and public speaker, his recent books include *American Treasures; The Caning: The Assault That Drove America to Civil War*; and *A City So Grand: The Rise of an American Metropolis, Boston 1850-1900*.

Steve's other books include *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:*

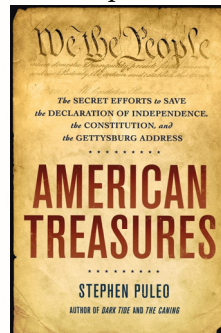
*The True World War II Story of the USS Eagle 56*; and *Dark Tide: The Great Boston Molasses Flood of 1919*. He donates a portion of his book proceeds to the Juvenile Diabetes Research Foundation (JDRF).

A former award-winning newspaper reporter and contributor of feature stories and book reviews to *American History* magazine and the *Boston Globe*, Puleo has made more than 540 author appearances. Steve holds a master's degree in history from UMass-Boston and has taught at Suffolk University. He resides with his wife, Kate, south of Boston.

### *American Treasures: The Secret Efforts to Save the Declaration of Independence, the Constitution, and the Gettysburg Address*

*American Treasures* charts the creation and little-known journeys, including a top secret 1941 removal to Fort Knox, of these priceless American documents. From the risky and audacious adoption of the Declaration of Independence in 1776, to our modern Fourth of July celebrations, the book shows how the ideas captured in these documents underscore the nation's strengths and hopes, and embody its fundamental values of liberty and equality.

Steve Puleo weaves exciting stories of freedom under fire – from the smuggling of the Declaration and Constitution out of Washington days before the British burned the capital in 1814, to their covert relocation during WWII – crafting a sweeping history of a nation united to preserve its democracy and the values embodied in its founding documents.



### BREAKOUT SESSIONS

*Auditing & Administering Commercial Leases: Traps for the Unwary*

*New Marijuana Laws and Smoke-free Housing: The Impact of Recreational and Medical Marijuana*

*Digging into the New Deed Indexing Standards*

*Hot Topics in Landlord/Tenant Law: Fast & Furious Version*

*Navigating Real Estate Broker Commission Disputes*

*Ethics of Remote Offices and Shared Office Space*

*Recent Developments in Massachusetts Case Law*

### Practical Skills Sessions

*Surveys and Plans: What Helps Your Client*

*Affordable Housing Restrictions: Potential Pitfalls for Practitioners*

*Conveying Real Estate Out of Probate*

### REBA CONTINUING EDUCATION SECTION

Kendra L. Berardi, Co-chair  
Elizabeth J. Young, Co-chair

### CLE CREDIT

CLE credits in New Hampshire and Rhode Island are pending

### SPONSORS & EXHIBITORS

For more information about the Exhibitor & Sponsor Program, contact Jessica Trenouth at [trenouth@reba.net](mailto:trenouth@reba.net) | 617.854.7555

### REBA CONTACT

For questions, please contact REBA at 617.854.7555 or [admin@reba.net](mailto:admin@reba.net). You may also visit us online at [www.reba.net](http://www.reba.net).

CONFERENCE REGISTRATION ENCLOSED

# SCHEDULE OF EVENTS

7:30 AM - 8:30 AM	Registration and Exhibitors' Hour
8:30 AM - 1:15 PM	BREAKOUT SESSIONS (see descriptions below)
1:20 PM	LUNCHEON PROGRAM
1:20 PM - 1:40 PM	Opening Remarks from President Diane Rubin
1:40 PM - 2:00 PM	Luncheon Keynote Address by Stephen Puleo
2:00 PM - 2:20 PM	Business Meeting, Committee Reports & REBA Awards
2:20 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



Peter F.  
Granoff



Michael  
Holiday

## *Auditing & Administering Commercial Leases: Traps for the Unwary*

Today's office and retail commercial leases are increasingly complex. Sophisticated commercial leases present a myriad of interrelationships among clauses within the lease (i.e., assignment/sublet, use, signage, and alteration clauses, or indemnification and insurance clauses), as well as between a commercial lease and other documents bearing upon a development project, such as financing, insurance and title documents, and construction requirements, which are not attached to a lease but which can affect its negotiation. These complexities are not limited to major office building, shopping mall or mixed-use developments, reflected in a typical 110-page lease, but also appear in smaller projects as well, reflected in shorter documents. This panel will focus on these various complexities, and consider how counsel to landlords and tenants can address these matters during lease review and negotiation to avoid "traps for the unwary."

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

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



Kate Moran  
Carter



Adam D.  
Fine

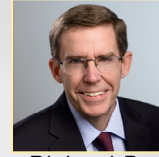
## *New Marijuana Laws and Smoke-free Housing: The Impact of Recreational and Medical Marijuana*

Our presentation will provide a background and overview of the Massachusetts medical and recreational marijuana laws and enabling regulations, particularly focused on the personal usage aspects of the laws. We will also discuss what impact the personal use provisions of the law may have on residential landlords and condominium associations. In the era of smoke-free communities, what accommodations, if any, need to be made for disabled residents with a prescription for medical marijuana? Where the use of marijuana is still illegal under Federal statutes, what impact do these new state laws have on federally-subsidized housing or condominiums that obligate unit owners to use their units in compliance with all state, local and federal laws, ordinances, and regulations? How will personal cultivation regulations impact shared utilities within a building? What concerns might landlords and community associations have about anticipated marijuana delivery services? The presentation will provide attendees with ways to plan for the impending arrival of the marijuana industry in Massachusetts.

# SCHEDULE OF EVENTS

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

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



Richard P.  
Howe Jr.



Mary  
Olberding

## *Digging into the New Deed Indexing Standards*

Our panelists will highlight the changes made in the 2018 version of the Indexing Standards. They will also discuss how new statutes, court decisions and technology, along with public policy considerations, influenced this newest version of the Indexing Standards. The session will provide ample time for questions about the Standards and other registry-related matters. The Register in Hampshire County, Mary Olberding is the current President of the Massachusetts Register of Deeds Association. A long-time contributor to *REBA News* and Register at Middlesex North, Dick Howe edited the Indexing Standards.

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

11:00 AM - 12:00 PM | CONFERENCE ROOM 103



Kenneth A.  
Krens



Ted S.  
Papadopoulos



G. Emil  
Ward

## *Hot Topics in Landlord/Tenant Law: Fast & Furious Version*

In this session, you will learn about several hot topics in residential landlord/tenant law...at a rapid pace! Crammed into 60 minutes, you will hear from tried and experienced lawyers in the industry regarding security deposit claims/compliance, rent escrow, handling reasonable accommodation requests, water/sewer charges to tenants, marijuana in leased dwellings, and airbnb and other transient/subletting issues. Upon completion, you will be better prepared to advise your clients and navigate them through summary process waters.

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

11:00 AM - 12:00 PM | CONFERENCE ROOM 104



Robert L.  
Bell Jr.



Michael F.  
McDonagh

## *Navigating Real Estate Broker Commission Disputes*

Broker commission disputes can impact transactions and sometimes delay a closing. Our panelists will counsel you on handling these thorny issues. The session will include a discussion on recent case law, procuring cause factors, agency relationships, offers of compensation and more. Learn about the services and requirements imposed on real estate brokers and salespersons from the Multiple Listing Service and the Realtor Association, including mandatory arbitration, mediation, and ombudsman services.

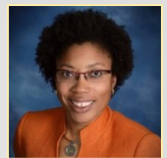
11:00 AM - 12:00 PM | ESSEX / LENOX ROOM



Heidi S.  
Alexander



Joseph S.  
Berman



Stacey A.L.  
Best

## *Ethics of Remote Offices and Shared Office Space*

Our panelists will discuss the practical and ethical aspects of 21<sup>st</sup> century office sharing. Technology has provided great opportunities to improve client service while allowing lawyers to operate efficiently. The panel will explain some of the cutting-edge technologies and systems that can enhance your practice. At the same time, new technology has created some unique ethical issues in addition to issues that arise from more traditional office-sharing arrangements. Our ethical experts will explain how to ensure that your use of technology complies with your ethical obligations.

**REGISTER ONLINE AT [WWW.REBA.NET](http://WWW.REBA.NET)**

# SCHEDULE OF EVENTS

8:30 AM - 9:30 AM | TIFFANY BALLROOM B

11:00 AM - 12:00 PM | CONFERENCE ROOM 101



Patricia M.  
Carlson



Michael A.  
Feldman



Paul R.  
Foley

## *Surveys and Plans: What Helps Your Client*

### ▶ A Practical Skills Session

This interactive session will shed light on the different kinds of surveys and plans that are useful when closing real estate deals. There will be insights from the perspectives of a professional land surveyor, underwriting counsel from a major national title insurance underwriter, and the CEO of Boston's largest survey firm. Our panelists will provide answers to many of the questions you have had regarding title and survey.

8:30 AM - 9:30 AM | CONFERENCE ROOM 101

9:45 AM - 10:45 AM | CONFERENCE ROOM 101



John M.  
Donnelly Jr.



Kurt A.  
James



Robert J.  
Moriarty Jr.

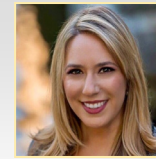
## *Affordable Housing Restrictions: Potential Pitfalls for Practitioners*

### ▶ A Practical Skills Session

Traversing the maze of affordable housing restrictions can be complicated and confusing. Learn how to identify, review and understand the basic forms of multifamily and homeownership restrictions, the statutory framework for restrictions, the effect of foreclosure on restrictions, and enforcement tools and challenges. This will provide a useful guide for practitioners, title attorneys, title examiners and title insurers.

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

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



Noel M.  
Di Carlo



Jennifer A.  
Maggiacomo



Evelyn J.  
Patsos

## *Conveying Real Estate Out of Probate*

### ▶ A Practical Skills Session

Our speakers are at the forefront of educating and understanding the MUPC. They will introduce the important elements of Testacy, Successors and Administration (TSA) that may be necessary to convey title to real estate out of an estate. They will also discuss formal and informal estates, who is empowered to convey, and what you need for a closing or the review of a title examination with a probated estate in the back title. Our panelists will share their knowledge, walk you through some fact patterns and show you how these concepts apply to actual scenarios which you may encounter in your practice.

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

*Video simulcasts of presentation in Conference Rooms 101 & 104*

## *Recent Developments in Massachusetts Case Law*

Now in his 40<sup>th</sup> year at these meetings, Phil continues to draw a huge crowd with this session. Attending his presentation on Recent Developments in Massachusetts Case Law is 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

# 2018 REBA SPRING CONFERENCE

## GENERAL INFORMATION

For questions, contact REBA at 617.854.7555 or [admin@reba.net](mailto:admin@reba.net), or visit us online at [www.reba.net](http://www.reba.net)

- ★ REBA's 2018 Spring Conference welcomes both members and non-members.
- ★ The registration fee includes the breakout sessions, luncheon and conference syllabus book.
- ★ Register by email, mail or online at [www.reba.net](http://www.reba.net), submitting one registration per attendee. Additional registration forms are available online at [www.reba.net](http://www.reba.net). We will confirm registration by email. REBA cannot offer discounts for registrants who attend only part of the Conference.
- ★ To guarantee a reservation, please send registration, along with the appropriate fee, on or before April 24, 2018. Registrations received after April 24, 2018 will be subject to a late registration processing fee of \$25. Registrations may be cancelled in writing on or before April 24, 2018 and are subject to a processing fee of \$25. Registrations cannot be cancelled after April 24, 2018; however, we welcome substitutions of registrants attending the program. Conference materials will be mailed to non-attendee registrants following the event.
- ★ Credits are available for professional liability insurance and continuing legal education in other states. For more information, contact Bob Gaudette at 617.854.7555 or [gaudette@reba.net](mailto:gaudette@reba.net).
- ★ Kindly refrain from cell phone use during the breakout sessions and luncheon.

## DRIVING DIRECTIONS

Four Points by Sheraton Hotel  
1125 Providence Turnpike (Route 1)  
Norwood, Massachusetts



### FROM BOSTON:

- Take I-93 South; continue onto I-95 (Route 128) North.
- Take Exit 15B, Route 1 South, toward Norwood.
- Continue 4.5 miles down Route 1 South.
- The hotel will be on your right after the Staples Plaza.

### FROM PROVIDENCE:

- Take I-95 North to Exit 11B, Neponset Street, Norwood.
- Drive 7/10 of a mile and turn left onto Dean Street.
- At the traffic light, turn left onto Route 1 heading south.
- The hotel will be on your right after the Staples Plaza.

### FROM THE WEST:

- Follow the Mass. Turnpike (I-90) East.
- Take Exit 14\* onto I-95 (Route 128) South.  
*\*From the West it is Exit 14; from the East, it is Exit 15*
- Continue South to Exit 15B (Route 1, Norwood).
- Continue 4.5 miles down Route 1 South.
- The hotel will be on your right after the Staples Plaza.

Four Points by Sheraton Hotel  
1125 Providence Turnpike, Norwood, MA

Tuesday, May 1, 2018  
7:30 AM – 2:45 PM

# 2018 REBA SPRING CONFERENCE

## REGISTRATION

COMPLETE AND RETURN THIS REGISTRATION WITH THE APPROPRIATE FEE TO:

REBA Foundation, 295 Devonshire Street, Sixth Floor, Boston, MA 02110  
admin@reba.net ♦ 617.854.7555 ♦ www.reba.net

	By Apr 24	After Apr 24
<input type="checkbox"/> YES! Please register me as a REBA member in good standing.	\$225	\$250
<input type="checkbox"/> YES! Please register me as a guest, as I am not a REBA member.	\$265	\$290
<input type="checkbox"/> I would like to purchase the conference syllabus, as I am unable to attend.	\$200	\$200
	\$_____	\$_____

### Payment Information:

CHECK

Check No: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

CREDIT CARD

Card #: \_\_\_\_\_

Expiration: \_\_\_\_\_



### Registrant Information:

Name of Registrant: \_\_\_\_\_ Esq. (y/n): \_\_\_\_\_

Call Name (for nametag): \_\_\_\_\_ Email: \_\_\_\_\_

Firm/Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Tel: \_\_\_\_\_ Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

### Luncheon Entrée Selection:

- Grilled petit filet mignon with a red wine demi-glace
- Pan-seared chicken with Hunter sauce ~ *tomatoes, herbs and mushroom*
- Roasted acorn squash with root veggies on tomato coulis ~ *vegetarian & gluten free*
- None, as I will not be eating at the luncheon
- None, as I am unable to stay for the luncheon