

Professional Development & Education Forum

Thursday September 11th, 2025 / ZOOM

Region Rep: Gayle Jenkins

CAR EDUCATION UPDATE - Nate Osollo

45free.car.org - Ethics, 45CE & More

Free Ethics Course & Fair Housing Package
required every 3 years.

- 2025 is start of Fair Housing Requirement
- Classes are due 2027 or prior
- Classes meet NAR Requirements

FREE License Renewal Package

- Courses are updated annually

FREE Disaster Preparedness Course

- This is the first course in a 4-part series that results in Certification
tips to become a community resource.

- log in to store.car.org and link membership
- Use code **PREPARE**

OnlineEd > for other COURSES

Classes Published This Year

- Master the 1031 Exchange
- Top Questions & Answers about Open Houses
- Natural Disasters
- Fire Prevention and Safety
- Broker Compensation in 2025: BRBC & RLA
- Home Modification Specialist

Classes Coming Soon

- Immigration and Tenants
- Mobile Home Parks
- etc etc

Member Benefit Transaction Coordinator User Profile

- o being able to create a separate profile for the TC and the agent sets the permissions from inside your account
- o Certified Transaction Coordinator (CTC)
- o +17 hours of education in this renewable program
- o TC Directory > TC must meet the TC requirements...
- o All other types of Certification Programs

Store.car.org

- publications, designations, certifications, occasional free class, members get 50% off most classes.

Car.org - Member Benefit

- 45CE, Ethics & Fair Housing courses, course calendar, MLO, Pre-License, harassment, etc
- C.A.R. Probate & Trust Certification
- Use Code PROBATE10 to get a 10% discount on Probate Certification available from C.A.R. Education ***Expires 9/30/25***

PROBATE TRANSACTIONS - PANEL AND Q&A

Jeff Starbuck (Practitioner) / Andrea Patton (Probate Attorney) /
Noah Prestwood (Title Rep)

Difference between Trust & Probate

- Trust is a written document
- Probate is court supervised....someone has died
- administered through the court
- a lot of requirements you wouldn't see on a trust
- apprx 1-2 years to get a probate closed
- 60 days to get an appointed administrator and executor
- Questions that Title Company gets asked
 - o who has been appointed as admin or executor (by the court)
 - o have the letters been sent, title needs a copy
 - o if full or limited authority
 - o understanding of the process and communication with the attorney
 - o Title and Prelim need to be ordered right away to make sure the property is clean, no liens, etc. Also to check the vesting and how it reads
- For Agents > Listen, give grace to those that are mourning, sincere condolences, do best to keep things moving forward.

Trustee - Trustee of the trust (Original Trustee)

Successor Trustee (person steps in if original Trustee cannot perform or have passed).

Beneficiary is getting the asset, not necessarily able to make decisions.

Personal Administrator - When goes to probate since there is no will, the court appoints this person.

With a Trust - When Preparing Property / Per Escrow: Who is the Trustee and they want to get a copy of the Trust and get that to Title company. Who has authority. Check all the documents.

- doing a deep dive in the property so you have all the information upfront and who is allowed to sell etc.

Limited Authority - Someone couldn't qualify. Still need notifications. Takes more time. Need Court Confirmation. Must Publish the sale - publication runs 3x. Generally, courts want to see a min 10% deposit.

- **Agent Remarks in MLS** > say it's a Limited Authority ; put a range of what escrow could be; as-is sale; add as many details as possible. Maybe add how many beneficiaries. i.e. Successor is sole beneficiary

- Important that the Buyer knows the **risks** that they could lose with an overbid in the courts.

Full Authority - Admin can act with full authority w/ no court confirmation. Must give beneficiaries notice/**15 days**. If no one objects, Day 16 the escrow can close. GET INFO EARLY TO ATTORNEY. If someone does object the sale, then it goes back to court and needs court confirmation....this is rare but possible.

The Letters - Letters (1pg doc-says who the personal rep is, has taxID, all pertinent info.) goes out to title, escrow, bank (to open a bank account) etc.

Attorneys Probate Fee's - It's a statutory fee that gets paid at the END of the transaction. It's a flat rate that is a non-negotiable rate per Probate Law.

Finding Probate Leads: If agents have a good relationship and connections with the attorneys doing the probate it's good to let them know you can handle probates and are versed in probate real estate. Not all attorneys like to be cold called but they do like the agents to be certified.