



North Carolina Land Title Association Presents

Solid Trust Accounting Habits = Solid Trust

Elon University School of Law – Room 207
201 Greene Street, Greensboro, NC

Agenda – December 15, 2011

1:00 pm - 1:30 pm	Registration
1:30 pm - 2:30 pm	Trust Accounting Rules <i>Peter Bolac – Trust Account Compliance Counsel, NC State Bar</i>
2:30 pm - 2:45 pm	Coffee and Refreshments Break
2:45 pm - 3:45 pm	Cautionary Tales from the State Bar <i>Katherine Jean – General Counsel, NC State Bar</i>
3:45 pm - 4:45 pm	What to Expect from a Title Company Audit <i>Steven B. Brown – Senior VP and Title Attorney</i>

Speaker Bios

Peter G. Bolac

North Carolina State Bar, Trust Account Compliance Counsel

Peter joined the State Bar in 2011 as Trust Account Compliance Counsel and District Bar Liaison. As Trust Accounting Counsel, Peter oversees the new trust account compliance program, which helps lawyers improve trust account practices and avoid disciplinary action. As District Bar Liaison, Peter provides assistance and support to the judicial district bars and their officers. Education: BA from Wake Forest in 2006, JD from the University of Memphis in 2010.

Katherine Jean

North Carolina State Bar, General Counsel

Katherine E. Jean is general counsel and an assistant executive director of the North Carolina State Bar. As general counsel, she leads the Office of Counsel, which investigates allegations of professional misconduct, prosecutes disciplinary actions against lawyers, addresses the unauthorized practice of law, represents the State Bar in state and federal litigation, handles claims against the Client Security Fund and provides legal opinions on issues of interest to the State Bar and its committees and boards. After she received her BA

and JD degrees from the University of North Carolina in 1982 and 1985, Katherine clerked for two years for the Honorable John Webb. She was engaged in private practice in Raleigh for 18 years, first as a partner in McMillan, Kimzey, Smith and Plyer and then as a sole practitioner. Katherine joined the State Bar as a deputy counsel in 2005 and became general counsel in 2006.

Stephen B. Brown

Sr. Vice President and Title Attorney, Investors Title Insurance Company

Steve joined Investors Title in October, 1992, where he engages in underwriting; identifying and resolving major claims; risk management; managing North Carolina legislative and regulatory policy matters; and speaking and writing for attorney and paralegal education regarding legislative and regulatory issues and claims prevention and management. Steve currently serves as an advisory member of the board of directors for Real Estate Lawyers of North Carolina. Steve received his BA from Wake Forest University in 1981 and his JD from the University of North Carolina in 1984. Prior to joining Investors Title Insurance Company, Steve was engaged in the private practice of law in Raleigh, North Carolina for 18 years.