

**Meeting Minutes**

May 9, 2023

9:00 a.m. Virtual Meeting

**Members Present**

- Angela Balconi
- Kim Chose
- Carla Higginson
- Gail Kelsie
- Jeff Leghorn
- Derek Matthews
- Tom Peterson
- Bill Ronhaar, Chair
- Lori Smith

**Liaisons and Staff Present**

- Cathy Biestek, WSBA Staff Liaison
- Renata de Carvalho Garcia, RSD Director
- Bobby Henry, RSD Associate Director
- Kevin Fay, BOG Liaison
- Sarena Sayani, BOG Liaison
- Katherine Skinner, RSD Lead
- Anne Trent, RSD Paralegal

**PUBLIC SESSION**

- The meeting was called to order at 9:06 a.m. The Chair confirmed that a quorum was present.
- The Board approved the proposed March 14, 2023, meeting minutes as submitted.
- Outreach Update Bobby Henry updated the Board on the presentation given to the DEI Council that included LPO information.
- Cover Sheet The Board discussed a request from an LPO for an amendment to LPB Form 01-005/Cover Sheet (specifically, including the Trustee and/or other specific information required by a specific county when re-recording a deed of trust) and assigned the issue to the Forms Committee for full consideration.
- Examination Committee Report The Chair of the Examination Committee updated the Board on the progress of the Summer 2023 LPO exam. The multiple choice and essay portions are complete. There is one more committee meeting to complete the performance portion of the exam.
- Nominations for Board Positions Opening FY24 The Board approved the applications for Lori Smith, Tom Peterson, Derek Matthews, Kim Chose, and Nate Scott. The Board voted to elect Tom Peterson as Chair of the Board for FY24.
- Expense Reimbursement Request Form & Process Anne Trent gave a presentation about the reimbursement request form and tips for best practices.
- FY24 Meeting Schedule The Board approved the FY24 meeting schedule with six meetings total, two in-person and four virtual.
- Legal Deskbooks LPB discussed legal deskbook proposal scheduled to be considered by the BOG. The Board decided to circulate the proposal to LPB members for review and position on the issue.
- The meeting was adjourned at 10:06 a.m.



Respectfully submitted,

Cathy Biestek  
WSBA Staff Liaison to the LPB

DRAFT

**Meeting Minutes**

June 6, 2023

9:00 a.m. Virtual Meeting

**Members Present**

- Angela Balconi
- Kim Chose
- Carla Higginson
- Gail Kelsie
- Jeff Leghorn
- Derek Matthews
- Tom Peterson
- Bill Ronhaar, Chair
- Lori Smith

**Liaisons and Staff Present**

- Cathy Biestek, WSBA Staff Liaison
- Renata de Carvalho Garcia, RSD Director
- Bobby Henry, RSD Associate Director
- Kevin Fay, BOG Liaison
- Sarena Sayani, BOG Liaison
- Katherine Skinner, RSD Lead
- Anne Trent, RSD Paralegal

**PUBLIC SESSION**

- The meeting was called to order at 9:05 a.m. The Chair confirmed that a quorum was present.
- The Board reviewed the draft May 9, 2023 meeting minutes. Action on the revised meeting minutes is postponed to the next meeting.
- Update from Forms Committee Tom Peterson, the Chair of the Forms Committee, updated the Board regarding a recent request from a WSBA member to change the language in the LPB 01-05 Cover Sheet. The Forms Committee discussed the request via email and determined that changes to the forms were not necessary. The Committee voted to deny the request to change the form.
- Deskbook Proposal Carla Higginson, who is a former WSBA Governor, informed the Board that there is a proposal to make WSBA Deskbooks a free member benefit. She explained that the proposal has received mostly negative feedback from various groups and members particularly because it would entail raising member license fees.
- Suggested Amendment to APR 11 The Board also discussed a suggested amendment to APR 11 that would increase the CLE ethics credit requirements from six credits to eight credits. The MCLE Board proposal would require one credit of technology security ethics and one credit of mental health ethics.
- The public session of the meeting was adjourned at 9:40 a.m.

**EXECUTIVE SESSION**

- The Board reviewed and voted to approve the Summer 2023 LPO Exam.

Respectfully submitted,

Cathy Biestek  
WSBA Staff Liaison to the LPB



Mr. Robert W. Golden  
WSBA #2462LPO  
LPO

**Congressional District:** 5

**Applied Committee:** Limited Practice Board

**Application Reason:** Dear Ladies and Gentlemen,  
I have been in the closing /real estate industry for over 30 years. I am currently a manager and LPO for Frontier Title Company.. I served on the LPO Board of Directors several years ago.

What I bring to the board is a deep understanding of the closing process and also the lending side of things. i would love to serve an additional terms on the board if possible.

**History of Committee Service:**

**Limited Practice Board:** 1/15/2008 - 12/31/2011

**Limited Practice Board:** 2/2/2012 - 12/31/2015

**Employer:** Frontier Title and Escrow

**Number of Lawyers:** No response

**Areas of Practice:** No response

**Years of Practice:** 31

**Years of Membership:** 0

**Learned of Service From:** Colleague or friend

Washington State Bar Association  
1325 Forth Ave Suite 600  
Seattle Wa. 99101

RE: Opportunity to Serve on the LPO Board

Dear Ladies and Gentlemen,

My Name is Robert Golden, and am very interested in serving on the Limited Practice Board. I was a board member several years ago and I want to give back to the profession by serving another term on the LPO Board.

What I bring to the board is as follows:

1. With over 30 years of experience in the field of escrow, title and lending, I bring a deep understanding of how the whole program comes together.
2. I have a deep understanding of the rules and regulations involved with the LPO profession.
3. I tend to be able to see things from a realist prospective.
4. I have been a successful team player for over 30 years, with the ability to find common ground with most groups that I work with.

I would love to be involved with the LPO Board once again. It is a way that I can give back to an industry that I love. I look forward to any positive response I get. Should you need any additional information, please feel free to contact me . Thank you for your consideration.

Sincerely

Robert W. Golden  
LPO No. 2462

**ROBERT W. GOLDEN**

**EMAIL:** [REDACTED]

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**Objective:**

To obtain a position in a progressive organization, where I can utilize my broad and extensive experiences in Real Estate, and Banking. Using my skills to bring enhanced value, not only to my position, but the entire company.

Professional Experience:

**Title Officer** 10/01/2014 to 03/31/2016  
Pioneer Title Company of Washington  
Performed title record searches. Prepared title products for the use in banking, legal actions and title transfers. Worked with county departments to assure accurate reporting of ownership interests in real property.

**Escrow Officer** 10/01/2012 to 10/01/2013  
Spokane County Title Co, Spokane Wa.  
Performed real estate closing transactions. Worked with Buyers, Seller, Lenders and Realtors to insure that each transaction was satisfactory to all of the parties involved.

**Escrow Manager** 2/01/2011 to 10/01/12  
Allegro Escrow Services Inc, Spokane Wa.  
Responsible for the accuracy and reliability of all accounts.  
Maintained customer service levels to exceed clients expectations  
Managed the staffing and operations of the Spokane Branch.

**Retail Loan Officer** 01/2011 to 12/01/2011  
Global Credit Union, Spokane Wa.  
Fully responsible for the submission of mortgage loans  
Provided the very best customer service and home loan products.  
Maintained relationships with realtors and clients

**Real Estate Closer/Limited Practice Officer** 2008 to 01/2011  
Spokane County Title Company, Spokane Wa. 99201  
Responsible for efficiently closing all real estate transactions assigned.  
Act as a third party Escrow Agent for all parties to each transaction.  
Train Staff members to aid in the closing of the transactions.  
Provide the very best customer service to each party to the transaction.

**Closing Supervisor/Limited Practice Officer (LPO) (AVP)** 1999 to 2008  
Action Mortgage Company, Spokane Wa 99201  
Responsible for funding of all retail loans.  
Completed closing transactions in Wash, Or, Mt and Idaho.  
Fully responsible for drafting all retail mortgage loan documents for Sterling

Savings/ Private Banking Mortgage Program.  
Managed staff both locally and in out of State Locations.

**Real Estate Closer/Limited Practice Officer (LPO)** 1998 to 1999

Spokane County Title Company, Spokane Wa. 99201  
Responsible for efficiently closing all Real Estate Transactions.  
Administered and drafted legal documents to be recorded.  
Acted as a liaison among customers, lenders and realtors.  
Worked efficiently in promoting good client and customer relations.

**Real Estate Closer** 1995-1998

Washington Trust Bank, Spokane Wa. 99201  
Responsible for closing all Real Estate Loans, including sale and refinance transactions.  
Worked with Builders, Realtors and Clients to assure timely closings.  
Facilitated the Builder Benefit Program for the Corporation.  
Completed closing transactions in all of Eastern Washington and North Idaho Regions.  
Implemented consistent real estate procedures

**Escrow Manager** 1993 to 1995

Spokane County Title Co  
Managed and resolved all operational problems within the Escrow Division.  
Provided employee training to any new or current personnel.  
Compiled date reports and tracked current closing figures.  
Maintained any and/or all banking and accounting functions.  
Worked actively to increase productivity and expand client relationships.  
Performed all closing functions.

**Escrow Office Manager** 1991 to 1993

Phoenix Escrow Inc  
Effectively managed all personnel and company assets to achieve high Productivity.  
Responsible for all operations of Escrow Closing Company.  
Actively marketed and promoted company to increase company recognition.  
Perform daily and monthly branch accounting/banking functions.  
Expedited all real estate closings including all branch fundings.

**Real Estate Paralegal** 1988 to 1991

Witherspoon, Kelley, Davenport & Toole PS  
Set up and processed all real estate foreclosures for the firm.  
Generated all legal documents for closing transactions.  
Handled loan closings for commercial and residential properties.



Provide technical support to attorneys for all real estate transactions.  
Ordered title reports and loan payoff statements to complete closings.  
Responsible for the collection and tracking of all closing fees.

**Construction Loan Administrator:** 1986-1998

US Bancorp Mortgage.  
Reviewed construction budgets for large commercial projects.  
Worked with contractors on constructions budgets to ensure proper funding.  
Ordered and directly performed construction inspections.  
Participated with subcontractors on construction draw requests.  
Completed monthly construction draw requests.

**Education/Training**

- (1983) Bachelor of Arts Degree  
Eastern Washington University, Cheney Wa.
- (1992) Limited Practice Officer (LPO) License, Washington State Bar Assoc.
- (2002) Designated Escrow Office (DEO) License, Washington State DFI

Taken and Taught many real estate classes. Still teach real estate legal classes.

**Additional Activities:**

- 1996-1999 President and founding member of Eastern Washington Escrow Association
- 2002- Present: Board Member of Eastern Washington Escrow Association
- 1997-2002: Washington State Escrow Commissioner
- 2002-2008 Chairman, Washington State Escrow Commission
- 2005- First Vice President of Escrow Association of Washington.
- 2006 President Elect of Escrow Association of Washington
- 1007-2008 President of Escrow Association of Washington
- 2009-2010 Secretary of Board of Directors of American Escrow Association
- 2008- Present Limited Practice Board Member, Wash State Bar Association

**Other Qualifications:**

- Qualified management and leadership skills.
- Very competent in conducting Escrow and Lending process
- Motivated and actively involved in community.
- Proficient in various software applications, including, MS Word, Windows, Excell etc..

## REFERENCES

Yvonne Reppe



Joannie Spradling



Keith Newell

