

# CALIFORNIA ESCROW ASSOCIATION

## GUIDELINES TO FORM A REGIONAL ASSOCIATION OF THE CALIFORNIA ASSOCIATION

### 1) Planning Meeting

You must have a planning meeting, described as a gathering of escrow professionals for the purpose of bettering the escrow profession in a specific geographic location. The purpose of this meeting should be to:

- a) Appoint Officers for the proposed region
- b) Establish Bylaws (in accordance with the Bylaws of the California Escrow Association), Standard Operating Procedures and Standing Rules. Samples of these governing documents may be obtained from the California Escrow Association or another regional association in your surrounding area.
- c) Determine if region will be incorporated through the State of California, which is highly recommended by CEA. Procedure and information as to the incorporation process of a regional can be obtained through CEA.
- d) Establish dues structure, in compliance with the CEA guidelines to include Regional Dues, CEA Dues and AEA Dues.
- e) Determine Meeting schedule (monthly, bi-monthly, etc.) and Board of Directors meeting schedule.

### 2) Solicit Membership

Use the current CEA approved membership application to gather original charter applicants. CEA currently sets a minimum of fifteen (15) proposed charter members in order to apply to CEA for regional association status.

### 3) Submit Application to CEA

Complete the Regional Association Application and submit to CEA Headquarters at 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. The application shall be brought before the next regularly scheduled CEA Board of Directors meeting.

### 4) Acceptance by CEA

Once submitted, the proposed regional application shall come before the Executive Board of CEA for acceptance. Once accepted the CEA President shall formally announce to the Board of Directors the new Regional Association.

### 5) Once Accepted

The new regional association shall submit to the California Escrow Association **within 90 days** from date of CEA Acceptance the following:

- a) Copy of their Governing Documents;
- b) A minimum of fifteen (15) charter membership applications;
- c) Dues in accordance with the dues structure

# APPLICATION FOR A REGIONAL ASSOCIATION

Submit this application to the California Escrow Association, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. If you have any questions or need any assistance, please contact CEA at (916) 239-4075

NAME OF PROPOSED REGIONAL ASSOCIATION:

\_\_\_\_\_

CONTACT PERSON FROM PROPOSED ASSOCIATION:

\_\_\_\_\_

Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

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

Fax Number: \_\_\_\_\_ E-Mail (if available): \_\_\_\_\_

Please attach a list of the fifteen (15) charter members. Be sure to include their full name, company name, address, phone number, fax number, e-mail (if available) and if they are going to hold a position on the proposed Regional Association Board of Directors.

What have you proposed as your Regional Association Dues: \$ \_\_\_\_\_

What have you proposed as your General Membership Meeting and Board of Directors meeting schedule?

\_\_\_\_\_

\_\_\_\_\_

When do you plan to have your first General Membership Meeting? \_\_\_\_\_

Is your proposed association planning on Incorporation through the State of California?

YES  NO

Are any of your proposed members current PD holders?  YES  NO

Past PD holders?  YES  NO

Are any of your proposed members currently members of another Regional Association?

YES  NO

If yes, which regional associations: \_\_\_\_\_

\_\_\_\_\_

For Headquarters/CEA use only

WITHIN 90 DAYS FROM ACCEPTANCE, THE REGIONAL ASSOCIATION SHALL SUBMIT TO CEA HEADQUARTERS THE FOLLOWING: (1) Copy of their Governing Documents (2) At least fifteen (15) membership applications with the appropriate CEA/AEA dues; and (3) Listing of Officers for the Regional Association.

DATE OF ACCEPTANCE: \_\_\_\_\_