

# **REAL ESTATE BOOT CAMP**

**Thursday, April 14, 2016**

**8:30 AM - 5:00 PM**

**Berkeley College**  
**12 East 41<sup>st</sup> Street**  
**New York, NY**



## **AGENDA**

- 8:45 AM** **Registration and Breakfast (Lower Level)**
- 9:15 AM – 9:20 AM** **WELCOME REMARKS**
- 9:20 AM – 10:50 AM** **ALTA/NSPS SURVEY AND MINIMUM STANDARD  
DETAIL REQUIREMENTS**  
Presented by **Jim Brown** and **David Larkin**, Bock &  
Clark Corporation  
The coursework includes: Participants will learn  
about the 2016 standards for ALTA/NSPS\* Land Title  
Surveys that went into effect on February 23, 2016,  
surveyor certification, expanded/revised definitions  
of select Table A items, elements of the legal  
description and survey review. The discussion will  
include the common misconceptions and  
misunderstandings between surveyors and other  
parties involved in the transaction. The session will  
conclude with questions and answers from the  
group.
- 11:00 AM – 12:00 PM** **COMMERCIAL TITLE REPORTS AND  
ENDORSEMENT (What a Paralegal Needs to  
Know)**  
Presented by Zoy Balaskas, Esq. and Michelle M.  
Pombo, Esq., First American Title Insurance  
Company  
The coursework includes: review and identifying  
requirement presented in the owners report for fee  
and leasehold estate, different types of  
encumbrances and exceptions and how to clear  
them. During the seminar, attendees will discuss the

differences between Owner's and Lender's policies and which endorsements can be requested (and received) for each of the types of policies.

**12:00 PM – 12:45 PM**

**Lunch and Networking.**

**12:45 PM – 1:45 PM**

**ENVIRONMENTAL REPORTS AND ASSESSMENTS**

Presented by Vincent L. Jacques, P.E.,  
Civil/Environmental Engineer, Bock & Clark  
Corporation

The coursework includes: background, evolution of standards and recognized environmental conditions. What is covered by Phase I Environmental Site Assessment and who is potentially liable under CERCLA. Attendees will learn why some sites are called "superfund" sites, what are the recognized environmental conditions that require the issuance of the Phase II Report and review case studies.

**1:50 PM - 2:50 PM**

**WHAT'S HOT ON THE NYSBA REAL ESTATE  
LISTSERVE - ISSUES REAL ESTATE ATTORNEYS  
ARE DISCUSSING AND CLARIFYING TODAY  
AND WHERE PARALEGALS MAY ASSIST THE  
MOST**

Presented by W. Zehava Schechter, Esq.

The coursework includes: hands-on discussion about current issues and concerns brought up by New York State real estate attorneys and how paralegals can keep up with current case law.

**3:00 PM - 4:00 PM**

**ARE YOU READY TO CLOSE? (Fundamentals of  
Due Diligence: Lenders' Perspective)**

Presented by Carmen I. Pagan, Esq., Blank Rome  
LLP

The coursework includes: anatomy of a due diligence checklist and lenders' requirements, due diligence for different types of loans and structures.

**4:05 PM - 5:05 PM**

**COMMERCIAL LEASE REVIEW**

Presented Mariana Fradman, Paralegal, Nixon Peabody LLP

The coursework includes: the anatomy of a lease, review of different types of real estate leases and how to prepare a lease abstract. The attendees will discuss different due diligence items and their role in the process.

**5:05 PM – 5:15 PM**

**CLOSING REMARKS**

**\*CLE Credits Availability: 6.5 CLE Credits pending**

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## **SPEAKERS**

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### **ALTA/NSPS SURVEY AND MINIMUM STANDARD DETAIL REQUIREMENTS**

*Presented by Jim Brown and David Larkin, Bock & Clark Corporation*

**(90 minutes)**

**James J. Brown** (Jim) was named Director of Sales and Marketing for Bock and Clark in July of 2014. Jim has been with the company since 1983 in all aspects of the survey business. Prior to his current position, he served as Director of Bock and Clark's National Surveyors Network for fifteen years overseeing, managing and developing the staff and Project Teams. He has been involved with the National Network since 1994 and has managed hundreds of projects and coordinated and reviewed thousands of surveys. Jim started his career at Bock and Clark as a field technician, drafter and then manager of their Mortgage Location Services Division. He was instrumental in opening three branch offices in Ohio and developing other offices in other states.

He also has spent the last several years working on business development with Bock & Clark's sales and marketing division and strategizing business plans. Jim has offered presentations on ALTA/ACSM Land Title Surveys and Survey Review to hundreds of Law Firms, Bar Associations, CLE Providers, Corporations and Law Schools across the country. He has also co-authored the last several versions of Bock & Clark's Handbook for ALTA/ACSM Land Title Surveys.

Jim's practical surveying experience began when he was going through college in the late 1970's and began working for the Portage County Engineer in Ohio. He was a draftsman in the county map department reviewing land surveyor's work and legal descriptions for recording and drawing plot plans. He was promoted to the position of supervisor and Assistant Tax Map Draftsman to the County Engineer, Leroy Satrom, P.E., P.S.

Jim is a native Ohioan and holds a Bachelor's Degree in Education from Kent State University.

Bock & Clark is a national commercial real estate due diligence company specializing in ALTA Surveys, Zoning Reports, Phase I ESAs and Property Condition Assessments.

For more information contact us at 1-800-787-8397 or visit our web site [www.bockandclark.com](http://www.bockandclark.com).



- Portions of some of Jim’s presentation are available for viewing on the Educational Tools and Seminars tab on the Bock & Clark website.

**David Larkin** is the Eastern Director of Business for Bock and Clark Corporation. His responsibilities include managing and maintaining customer relationships with new and existing clients for Bock & Clark’s national due diligence services, including ALTA Surveys, Zoning Reports and Environmental Services. David brings over 18 years of engineering sales, marketing, and management experience to Bock and Clark. Previous professional experience also includes working with surveying crews in much of the Southeast. He currently resides in Northern New Jersey and will be the main point of contact for east coast clients from Delaware to Maine. He holds a Bachelor of Science in Civil /Construction Engineering from Southern Polytechnic Institute of Technology in Atlanta, Georgia.

BOCK & CLARK – B&C ZONING – B&C ENVIRONMENTAL  
One source for ALTA Surveys, Aerial Surveys, Zoning Reports and Environmental Services  
Nationwide  
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**COMMERCIAL TITLE REPORTS AND ENDORSEMENTS**

*Presented by Zoy Balaskas, Esq. and Michelle M. Pombo, Esq., First American Title Insurance Company*

**(60 minutes)**

**Zoy Balaskas** is Senior Underwriting Counsel at First American Title Insurance Company – National Commercial Services. She began working for First American in 2005. She graduated New York University School of Law, earning a J.D. in 1998, and an L.L.M. in 2003. As Senior Underwriting Counsel, Zoy underwrites title insurance in connection with the acquisition, leasing and financing of New York commercial and residential real property.

Prior to joining First American, Zoy worked in-house as a closing attorney for a mortgage lender, managing the company's settlement division. She spent some years working in the Private Bank of a large lending institution, and has also worked as an associate in a number of firms.

**Michelle M. Pombo** is Senior Underwriting Counsel of First American Title Insurance Company- National Commercial Services. She joined First American in April of 2007. Michelle graduated Pace University School of Law, after finishing a combined degree program earning a BA in 1998 and JD in 2000. As Senior Underwriting Counsel, Michelle underwrites title insurance in connection with the acquisition, leasing and financing of New York commercial and residential real property and co-operative units.

Prior to joining First American, Michelle engaged in private practice at two real estate firms in Westchester County.



**ENVIRONMENTAL REPORTS AND ASSESSMENTS**

*Presented by Vincent L. Jacques, P.E., Civil/Environmental Engineer, Bock & Clark Corporation*  
**(60 minutes)**

**Vincent L. Jacques**, P.E. is a Professional Engineer with 20+ years' experience conducting environmental investigations of contaminated sites, due diligence assessments, and hazardous material assessment/abatement projects throughout New England. Mr. Jacques has supervised and completed numerous Level I & II Environmental Site Assessments and Property Condition Assessments on industrial, commercial and residential properties for lending institutions, municipalities and private clients. Mr. Jacques has also been involved in various Phase III/remediation projects involving the restoration of impact soil, groundwater, and vapor gas. He also completed numerous mold, asbestos and lead-based paint surveys, abatement plans, operations and maintenance programs, project monitoring, and final clearance testing for various types of properties, each approved by appropriate state agencies. He also has set-up and operates a small Phase Contrast Microscopy (PCM) laboratory and is an analyst for asbestos PCM air samples. . Mr. Jacques also has significant experience in preparing storm water permits, Title V air permits, underground injection control permits, and spill prevention counter control measure plans.

Mr. Jacques currently serves as the New England Regional Manager for B & C Environmental. In this capacity, Mr. Jacques is responsible for business development, management of staff and overall management of the profit center and analytical laboratory. Mr. Jacques is responsible for recruiting, rewarding, motivating and managing employee performance; ensuring that business development and client service is a priority in the office; ensuring that QMS and Health & Safety processes are supported and followed; developing and ensuring that the budget for the area is achieved and improved in with regard to profitability; ensuring that Accounts Receivable and Work-In-Progress targets are met; accountability for office administration and accounting for the area; responsible for employee annual salary and bonus recommendations; and responsible for the physical assets within the area.

**EDUCATION**

The University of Rhode Island, 1992, B.S. in Civil Environmental Engineering  
Northeastern University, 1997, Certificate of Professional Achievement, Specialization:  
Hazardous Waste Management. Concentration: Site Investigation and Remediation

#### CAREER SUMMARY

2012- Present- Bock & Clark Environmental, New England Regional Manager  
2009-2012 The Orin Group – Narragansett, RI, New England Regional Manager  
2001-2009 Jacques Whitford Company, Inc. – Lincoln, Rhode Island, Area Manager  
1994-2002 Kenyon Environmental, Inc. – Pawtucket, RI, President and Sole Owner  
1992-1994 Kenyon Environmental, Inc. – East Providence, RI, Vice President and Co-Owner  
1988-1992 Narragansett Bay Commission, Providence, RI, Environmental Engineer Technician – Developed Waste Water Local Limits

#### PROFESSIONAL COURSES AND DESIGNATIONS

- Professional Engineer, Rhode Island – No. 7047, 1999
- Certified Asbestos Inspector & Project Designer, Rhode Island – AAC-0409IS/AAC-0409PD
- Certified Asbestos Inspector, Project Designer and Project Monitor, Massachusetts – AI 040309/AD 040576/AM 040310
- Certified Asbestos Analyst – PCM – NIOSH 7400
- Environmental Lead Inspector Training – Initial 40 hour course
- Princeton Gamma-Tech, Inc. X-ray Fluorescence Analyzer Training
- Certificate of Achievement – Property Condition Assessment Course – EDR Commonground
- Lorman Education Services – Green Building Design Basics
- Contech, Construction Products, Erosion Control Design Short Course
- NEWMOA In-Situ Chemical Oxidation
- Jacques Whitford Company, Mold Investigation and Remediation Course
- OSHA 29 CFR 1910.120, 40 Hour Hazardous Waste Site Worker Protection Training
- OSHA 29 CFR 1910.120, Confined Space Entry
- OSHA 29 CFR 1910.120, 8 Hour Supervisor Training
- OSHA 29 CFR 1910.120, 8 Hour Refresher Training
- OSHA 10 Hour Construction Safety and Health
- First Aid and CPR Trained

#### MEMBERSHIPS/ASSOCIATIONS

- American Industrial Hygiene Association (AIHA) – PCM Proficiency Testing
- American Society of Civil Engineers
- Member, Chi Epsilon – Civil Engineering Honor Society
- Member, Tau Beta Pi – Engineering Honor Society
- Member, Golden Key – National Honor Society
- Member, National Environmental Assessment Association

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INC.

- Member, National Society of Environmental Professionals
- Member, PADI - Certified for Scuba Diving
- Member, American Philatelic Society

**"WHAT'S HOT ON THE NYSBA REAL ESTATE LISTSERVE - ISSUES REAL ESTATE ATTORNEYS ARE DISCUSSING AND CLARIFYING TODAY AND WHERE PARALEGALS MAY ASSIST THE MOST"**

*Presented by W. Zehava Schechter, Esq.*

**(60 minutes)**

**W. Zehava Schechter**, Esq. concentrates her private practice in real estate law, estate planning, and estate administration, contracts, and business formation and dissolution. She is admitted to the Bar of New York (1989), Massachusetts (1989), and Israel (1993). Ms. Schechter graduated with a B.A. in Politics in 1983 from Brandeis University and received her J.D. in 1989 from Suffolk University Law School.

Ms. Schechter's 26 year career has included law firm practice as well as sole practitioner status. Her favorite quote is "You Miss 100% of the Shots You Don't Take" (attributed to Wayne Gretzky). In addition to her law practice, Ms. Schechter is a certified New York State Court Interpreter in the Hebrew Language, a certified New York State Guardian Ad Litem, and the owner of a custom window treatment business, Your Shady Window Lady, LLC.



**ARE YOU READY TO CLOSE?  
(FUNDAMENTALS OF DUE DILIGENCE: LENDERS' PERSPECTIVE)**

Presented by Carmen I. Pagan, Esq., Blank Rome LLP

**(60 minutes)**

**Carmen I. Pagan** is a senior associate at Blank Rome LLP. She graduated from Hofstra University School of Law in the year 2000. She concentrates her practice in real estate matters and represents financial institutions and developers in all aspects of commercial lending, including affordable housing, conventional loans, commercial mortgage backed securities, senior housing, student housing and bond financings and other loans involving subsidies, complex structures, IRS Section 1031 like-kind exchanges, lease-back structures, ground leases, master leases, real estate investment trusts, industrial development agencies, state housing finance agencies, local municipalities, defeasance, low income housing tax credits and historic tax credits. She is committed to mentoring other real estate associates and paralegals and is actively involved in providing pro bono representation to underrepresented individuals. She is fluent in Spanish and Portuguese.



## **COMMERCIAL LEASE REVIEW**

*Presented Mariana Fradman, Paralegal, Nixon Peabody LLP*  
**(60 minutes)**

**Mariana Fradman** is a paralegal working with the Real Estate and Affordable Housing practice groups at Nixon Peabody LLP, multinational law firm. She has over twenty years of real estate experience in real estate practice, concentrating in the areas of transactional real estate law addressing all aspects of project development, rehabilitation, and operation, including acquisitions, dispositions, public and private financings, joint ventures and investments. Her previous experience includes paralegal positions with several large NYC law firms.

In addition to her full time job as a paralegal at Nixon Peabody LLP, Ms. Fradman is an Adjunct Professor at Long Island University, Brooklyn Campus, teaching business and real estate law at the Paralegal Certificate Program. She continues to be a member of the NYCPA Executive Board of Directors where she serves as Treasurer and chairs the Mentor Program and Continue Legal Education Committees.

As a seasoned professional, Mariana has presented at various continuing legal education seminars in person and on-line, including, but not limited to Long Island University, Brooklyn Campus, New York Career Institute, Lorman Educational Services, Paralegal Knowledge Institute and at numerous CLE seminars hosted by New York City Paralegal Association. She was awarded "Distinguished Faculty" Badge by Lorman Educational Services in February 2014. Mariana's articles were published on The Paralegal Society Blog (<http://theparalegalsociety.wordpress.com/>), The Paralegal Resource (<https://www.theparalegalresource.com>) and in the National Paralegal Reporter (<http://www.paralegals.org/default.asp?page=14>).