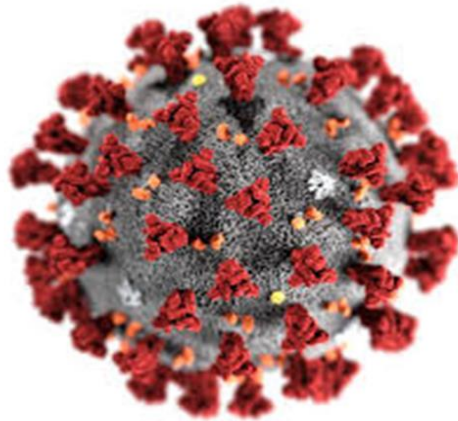


**County Recordors' Association of California**  
110<sup>th</sup> Annual & New Law Conference  
1<sup>st</sup> Virtual Conference  
December 14-15, 2020

**California Association of Clerks & Election Officials**  
1<sup>st</sup> Virtual New Law Conference  
December 16-17, 2020

**Agenda**

**“THE YEAR TO FORGET”**



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## County Records' Association of California

110<sup>th</sup> Annual & New Law Conference

1<sup>st</sup> Virtual Conference

December 14-15, 2020

### **MONDAY – 14<sup>th</sup>**

- 8 – 9 CRAC Principals only VIRTUAL BREAKFAST
- 10 CRAC Legislative Meeting
- Co-chair, Monique Blakely, Los Angeles County
  - Co-chair, David Valenzuela, Ventura County
  - Rob Grossglauser, Legislative Advocate
- 10:30 DRIM Committee Meeting
- Co-chair, Danielle Rifilato, Santa Barbara County
  - Co-chair, Jaime Pailma, Los Angeles County
- 11 CRAC Board of Directors Meeting
- President, Mark Lunn, Ventura County
  - Vice President, Donna Allred, Sacramento County
  - Treasurer, Leslie Morgan, Shasta County
  - Secretary, Rebecca Turner, Calaveras County
    - Treasurer Report
    - By Laws Committee

### **TUESDAY – 15<sup>th</sup>**

- 9 Exhibitor Introductions
- Exhibitor presentation
  - Gift drawings
- 10 Records' General/Opening Session
- Pledge of Allegiance
  - Roll Call
  - President's Message
  - Committee Reports
- 10:45-11 Break

**TUESDAY – 15<sup>th</sup> CRAC Continued:**

- 11            New Law Presentation
- Monique Blakely, Los Angeles County
  - David Valenzuela, Ventura County
  - Rob Grossglauser

- 11:30        Mutual Problems
- Jaime Pailma, Los Angeles County
  - Danielle Rifilato, Santa Barbara County

ADJOURN



**California Association of Clerks & Election Officials**  
1<sup>st</sup> Virtual New Law Conference  
December 16-17, 2020

**WEDNESDAY, 16<sup>th</sup>**

- 8-9 CACEO Principals only VIRTUAL BREAKFAST
- 9:30-10:30 COUNTY CLERK Legislative Committee
- Co-chair, Donna Allred, Sacramento County
  - Co-chair, Val Handfield, Contra Costa County
  - Matt Siverling, Legislative Advocate
- COUNTY CLERK – CRM Meeting
- Co-chair, Monique Blakely, Los Angeles County
  - Co-chair, Jaime Pailma, Los Angeles County
- 9-11 ELECTIONS Legislative Committee
- Co-chair, Ryan Ronco, Placer County
  - Co-chair, Tricia Webber, Santa Cruz County

**WEDNESDAY – 16<sup>th</sup> CACEO Continued**

- 11-12 CACEO Board of Directors Meeting
- President, Brandi Orth, Fresno County
  - Vice President, Donna Johnston, Sutter County
  - Treasurer, Tommy Gong, San Luis Obispo County
  - Secretary, Michael Vu, San Diego County
- 1-2 ELECTIONS – Voters with Specific Needs (closed to vendors)
- Co-chair, Tim McNamara, Los Angeles County
  - Co-chair, Eren Mendez, Contra Costa County
- 2-3 ELECTIONS – Fiscal Staff Workshop (closed to vendors)
- Cathy Darling Allen, Shasta County

## **THURSDAY, 17<sup>th</sup>**

- 8:30-9:30 CACEO Exhibitor Introductions
- Exhibitor Presentation
  - Gift drawing
- 9:30-10:45 CACEO General Session
- Pledge of Allegiance
  - Roll Call
  - President’s Message
  - Committee Reports
- 10:45-11 Break
- 11-11:30 COUNTY CLERK – New Law Presentations
- Donna Allred, Sacramento County
  - Val Handfield, Contra Costa County
- 11:30-12:30 ELECTIONS – New Law Presentations
- Ryan Ronco, Placer County
  - Tricia Webber, Santa Cruz County
- 11:30-1 COUNTY CLERK – Mutual Problems
- Val Handfield, Contra Costa County
  - Donna Allred, Sacramento County
- 1-5 ELECTIONS – BPC Meeting (open to BPC member counties only)
- John Gardner, Solano County
- Adjourn

**\*\* WELCOME to  
OUR EXHIBITORS \*\***

# **2020 New Law Workbook**

*Presented by*

## **County Recorders' Association of California**

**Document Reference and Indexing Manual Committee**

**Mutual Problems/Uniform Practice Committee**

**1st Virtual Conference  
December 14-15, 2020**

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## Table of Contents

### **New Laws**

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<b>SB 1305</b> .....	3

**This page intentionally blank to facilitate double-sided printing.**

## 2020 Chaptered Bill Analysis For 2021 Implementation

<b>Bill Number:</b>	<b>SB 406</b>
<b>Chapter:</b>	302
<b>Author:</b>	Pan
<b>Topic:</b>	Health Care: Omnibus bill
<b>Impact:</b>	<b>Important</b>
<b>Summary:</b>	<p>Existing law authorizes the State Registrar, a local registrar, or a county recorder to furnish a certified copy of a birth, death, marriage, or military service record to an authorized person, as defined, who submits a written, faxed, or digitized image request accompanied by a notarized statement sworn under penalty of perjury that the applicant is an authorized person. Existing law, until January 1, 2021, authorizes the official to accept an electronic request and an electronic acknowledgment if the request for a certified copy of a birth, death, or marriage record is made electronically and the electronic acknowledgment verifies the identity of the applicant using a multilayered remote identity proofing process.</p> <p>This bill would extend the above-described authorization for an electronic request and an electronic acknowledgment to January 1, 2022.</p>
<b>Effect:</b>	Amends Section 103526 of the Health and Safety Code
<b>Actions Required:</b>	Inform staff
<b>Presenter:</b>	David Valenzuela, Ventura
<b>Notes:</b>	N/A

# 2020 Chaptered Bill Analysis For 2021 Implementation

**Bill Number:** SB 1079

**Chapter:** 202

**Author:** Skinner

**Topic:** Foreclosure

**Impact:** Information Only

**Summary:** This bill is intended to mitigate against blight, vacancy, and the transfer of residential property ownership from owner occupants to corporate landlords in the event that California experiences a wave of foreclosures. Forbids a foreclosure trustee from bundling properties for sale at a foreclosure auction, instead requiring that each property be bid on separately. Provides tenants, prospective owneroccupants, nonprofit affordable housing providers, and public entities a 45-day window to purchase residential properties of 1-4 units if they are able to match or exceed the highest bid at a preceding foreclosure auction. Increases the civil fines that local governments can assess against owners who fail to maintain properties acquired at foreclosure sale, while also providing these owners with more information about alleged violations and additional time to remedy violations.

**Effect:** Section 2924f of the Civil Code is amended and rules to support owner occupied homes following a foreclosure.

**Actions Required:** Inform staff

**Presenter:** Melinda Greene, Santa Barbara

**Notes:**

## **2020 Chaptered Bill Analysis For 2021 Implementation**

**Bill Number:** SB 1305

**Chapter:** 238

**Author:** Roth

**Topic:** Revocable Transfer on Death Deeds

**Impact:** **Important**

**Summary:** Existing law governs the execution, revocation, and effectiveness of a revocable transfer on death (TOD) deed, defined as an instrument that makes a donative transfer of property to a named beneficiary, as defined, that operates on the transferor's death, and remains revocable until the transferor's death. Existing law establishes statutory forms for executing and revoking a revocable TOD deed that include provisions and instructions for the forms to be notarized by the transferor and recorded with the county recorder. Existing law requires that subsequent pages of the form to execute a revocable TOD deed include statutory "common questions" regarding the use of that form. Existing law requires that, in order to be effective, a revocable TOD deed be recorded on or before 60 days after the date it was executed. Existing law makes these provisions inoperative on January 1, 2021.

This bill would extend the operative date of those provisions until January 1, 2022.

**Effect:** An act to amend Section 5600 of the Probate Code, relating to revocable transfer on death deeds.

**Actions Required:** Inform staff and DRIM update

**Presenter:** Danielle Rifilato, Santa Barbara County

**Notes:** Extends the sunset date for Revocable Transfer on Death Deed from January 1, 2021 to January 1, 2022. DRIM page will be updated to reflect this.

**Title**  
**Revocable Transfer on Death Deed (Revocable TOD Deed)**

**Purpose**  
 Transfers real property to a designated beneficiary upon the death of the owner (transferor) without a probate proceeding

**Requirements**

1. Name of transferor/owner
2. Name of beneficiary(ies)
3. Description/identification of real property
4. Signature of transferor/owner
5. Signature acknowledged

\* Document type is NOT subject to Documentary Transfer Tax and does NOT require a Preliminary Change of Ownership Report

**Fees**  
 Regular

**Legal References**

Probate - 5620-5628, 5624 (ack), 5642 (form), 5656 (a) (DTT/PCOR)\*

***Pursuant to SB 1305, the provision for recording a Revocable TOD Deed has a sunset date of 1/1/2022, unless it is extended or deleted by new legislation.***

Note: If a co-owner wishes to name a beneficiary, a separate form must be created and recorded.

**Comments**

Note: Pursuant to Probate Code 5680(a), an Affidavit of Death (Probate Code 210) may be recorded to establish the fact of death of the transferor.

Pursuant to AB 1739, Chapter 65 (chaptered on 7/9/18), the "Common Questions" are not required to be recorded. This applies to RTDD's recorded on or after the effective date of this act.

Local Use	
Index	Ordinances/Opinions
Grantor: Transferor/Owner Grantee: Beneficiary(ies)	

RECORDING REQUESTED BY \_\_\_\_\_

AND WHEN RECORDED MAIL TO \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE/ZIP \_\_\_\_\_

*added 2016, revised 2020*

**Revocable Transfer on Death Deed (Revocable TOD Deed)**

Assessor's Parcel Number \_\_\_\_\_

**IMPORTANT NOTICE:**  
 THIS DEED MUST BE RECORDED ON OR BEFORE 60 DAYS AFTER IT IS SIGNED AND NOTARIZED

Use this deed to transfer the residential property described below directly to your named beneficiaries when you die. YOU SHOULD CAREFULLY READ ALL OF THE INFORMATION ON THE OTHER PAGES OF THIS FORM. You may wish to consult an attorney before using this deed. It may have results that you do not want. Provide only the information asked for in the form. DO NOT INSERT ANY OTHER INFORMATION OR INSTRUCTIONS. This form MUST be RECORDED on or before 60 days after the date it is signed and notarized or it will not be effective.

**SAMPLE**

**PROPERTY DESCRIPTION**  
 Print the legal description of the residential property affected by this deed:

**BENEFICIARY(IES)**  
 Print the FULL NAME(S) of the person(s) who will receive the property on your death (DO NOT use general terms like "my children") and state the RELATIONSHIP that each named person has to you (spouse, son daughter, friend, etc.)

**TRANSFER ON DEATH**  
 I transfer all of my interest in the described property to the named beneficiary(ies) on my death. I may revoke this deed. When recorded, this deed revokes any TOD deed that I made before signing this deed.


Sign and print your name below (your name should exactly match the name shown on your title documents):

Date \_\_\_\_\_

NOTE: This deed only transfers MY ownership share of the property. The deed does NOT transfer the share of any co-owner of the property. Any co-owner who wants to name a TOD beneficiary must execute and RECORD a SEPARATE deed.

APPROPRIATE ACKNOWLEDGMENT SHOULD APPEAR HERE

**\*\* WELCOME to  
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Total Elections Run

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**Contact Information:**

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[jbarnett@easyvotesolutions.com](mailto:jbarnett@easyvotesolutions.com)  
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*Mike Brown M. C. F. J. W. C.*  
*Shirley Reeder [Signature] [Signature]*  
*[Signature] April Johnson [Signature]*  
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Nancy Phillips, Cris Highnote, Brad Stiers

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Full-service printing, inserting, mail sorting completed at our purpose-built secure facility. Get data-driven materials accurately completed and shipped precisely to your election deadlines.

America's Election Partner®



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**CONNECTED COMMUNITIES  
ARE THRIVING COMMUNITIES**



## Modernize your operations and allow your community to thrive.

Your time and effort are valuable. As you adjust to the challenges COVID-19 presents, it is important to adapt processes to deliver the transparency and services your community deserves.

Imagine implementing tailored land and official records solutions to make operations run smoothly, allowing your community to focus on serving its constituents.

With Tyler's solutions, communities are thriving.

See what's possible at [tylertech.com/records](https://tylertech.com/records).

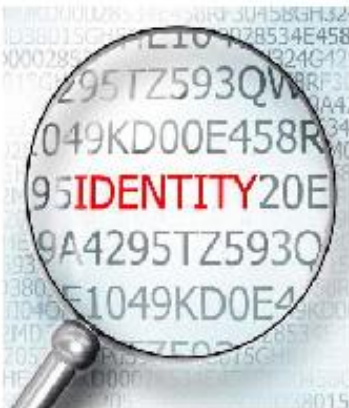


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The current COVID-19 pandemic has been a public health catastrophe. It has also put millions of people out of work. More people than ever are requesting vital records for benefits and unemployment purposes. A challenging retail environment confronts government agencies where constituents not only have far less money to spend, but will also restrict their movements and minimize their interactions with other people.

In this 'new normal', people are increasingly turning to the internet for commerce and communications. Providing excellent customer service and security is very, very demanding. And with the possibility of more infections and lockdowns on the horizon, it is more important than ever to provide safe, secure, and fast service. Below are some ways VitalChek can help you provide more robust service to your constituents.



### **Online and Phone Orders**

Remote ordering designed specifically for government. PCI level 1 compliance keeps customer data safe. Phone ordering is a great option for customers not comfortable or able to order online.

### **Electronic Identity Verification**

Avoid sending constituents to find a notary and make their online or phone applications more secure, convenient, and less costly.

### **Will Call**

In normal times, regular mail and UPS delivery options for remote orders were enough. However, during the current pandemic, multiple delivery options give constituents more peace of mind and flexibility. Offering will call reduces the amount of time customers are in your lobby and cuts down on crowds.

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US Imaging, Inc., provides on-site scanning of bound books, Photostat books, plats, microfilm rolls, jackets and aperture cards. We also provide low cost backup of digital images to archival quality microfilm. We have 43 years of experience and have had the pleasure of serving over 725 County Clerks and Recorders nationwide.

We have the most advanced scanners in the world, custom enhancement software and a unique process that produces the highest quality and lowest cost.

Please stop by our booth to see the difference and schedule a free estimate and sample. We look forward to helping you preserve the past, protect your constituents and create a more efficient future.

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