

# Course Outline

Marketing, Sales, and Service

REVISED: July/2021

## Job Title

Real Estate Agent

## Career Pathway:

Professional Sales

## Industry Sector:

Marketing, Sales, and Service

## O\*NET-SOC CODE:

41-9022.00

## CBEDS Title:

Professional Sales I

## CBEDS No.:

4130

**71-40-60**

## Escrows

**Credit:** 5

**Hours:** 60

### Course Description:

This competency-based course is the last in a sequence of four designed for real estate. It satisfies the statutory requirement for the salesperson's or broker's license. It includes instruction in basic escrow processes for individuals purchasing real estate property. Topics include a background for individuals who want to advance their professional standing in the real estate and escrow industry. Basic escrow theory is explained; basic escrow-specific vocabulary is introduced; and actual sample escrows enable individuals to progress through increasingly complex situations. Ethical laws and requirements are presented. The competencies in this course are aligned with the California High School Academic Content Standards and the California Career Technical Education Model Curriculum Standards.

### Prerequisites:

Enrollment requires concurrent high school students to be 18 years of age upon completion of the course.

**NOTE:** For Perkins purposes this course has been designated as a **capstone** course.

Department of Real Estate (DRE) Approval No. **4410-19 effective 7/3/2020**. DRE Statutory/Pre-License Course Completion Certificate provides maximum of 45 credit hours.

This course cannot be repeated once a student receives a Certificate of Completion.



## **COURSE OUTLINE COMPETENCY-BASED COMPONENTS**

A course outline reflects the essential intent and content of the course described. Acceptable course outlines have six components. (Education Code Section 52506). Course outlines for all apportionment classes, including those in jails, state hospitals, and convalescent hospitals, contain the six required elements:

(EC 52504; 5CCR 10508 [b]; Adult Education Handbook for California [1977], Section 100)

### **COURSE OUTLINE COMPONENTS**

### **LOCATION**

#### **GOALS AND PURPOSES**

Cover

The educational goals or purposes of every course are clearly stated and the class periods are devoted to instruction. The course should be broad enough in scope and should have sufficient educational worth to justify the expenditure of public funds.

The goals and purpose of a course are stated in the COURSE DESCRIPTION. Course descriptions state the major emphasis and content of a course, and are written to be understandable by a prospective student.

#### **PERFORMANCE OBJECTIVES OR COMPETENCIES**

pp. 7-23

Objectives should be delineated and described in terms of measurable results for the student and include the possible ways in which the objectives contribute to the student's acquisition of skills and competencies.

Performance Objectives are sequentially listed in the COMPETENCY-BASED COMPONENTS section of the course outline. Competency Areas are units of instruction based on related competencies. Competency Statements are competency area goals that together define the framework and purpose of a course. Competencies fall on a continuum between goals and performance objectives and denote the outcome of instruction.

Competency-based instruction tells a student before instruction what skills or knowledge they will demonstrate after instruction. Competency-based education provides instruction which enables each student to attain individual goals as measured against pre-stated standards.

Competency-based instruction provides immediate and continual repetition and In competency-based education the curriculum, instruction, and assessment share common characteristics based on clearly stated competencies. Curriculum, instruction and assessment in competency-based education are: explicit, known, agreed upon, integrated, performance oriented, and adaptive.

**COURSE OUTLINE COMPETENCY-BASED COMPONENTS**  
**(continued)**

<b>COURSE OUTLINE COMPONENTS</b>	<b>LOCATION</b>
<b>INSTRUCTIONAL STRATEGIES</b>	p. 25
<p>Instructional techniques or methods could include laboratory techniques, lecture method, small-group discussion, grouping plans, and other strategies used in the classroom.</p> <p>Instructional strategies for this course are listed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructional strategies and activities for a course should be selected so that the overall teaching approach takes into account the instructional standards of a particular program, i.e., English as a Second Language, Programs for Adults with Disabilities.</p>	
<b>UNITS OF STUDY, WITH APPROXIMATE HOURS ALLOTTED FOR EACH UNIT</b>	Cover
<p>The approximate time devoted to each instructional unit within the course, as well as the total hours for the course, is indicated. The time in class is consistent with the needs of the student, and the length of the class should be that it ensures the student will learn at an optimum level.</p> <p>Units of study, with approximate hours allotted for each unit are listed in the COMPETENCY AREA STATEMENT(S) of the course outline. The total hours of the course, including work-based learning hours (community classroom and cooperative vocational education) is listed on the cover of every CBE course outline. Each Competency Area listed within a CBE outline is assigned hours of instruction per unit.</p>	
<b>EVALUATION PROCEDURES</b>	pp. 25-26
<p>The evaluation describes measurable evaluation criteria clearly within the reach of the student. The evaluation indicates anticipated improvement in performances as well as anticipated skills and competencies to be achieved.</p> <p>Evaluation procedures are detailed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructors monitor students' progress on a continuing basis, assessing students on attainment of objectives identified in the course outline through a variety of formal and informal tests (applied performance procedures, observations, and simulations), paper and pencil exams, and standardized tests.</p>	
<b>REPETITION POLICY THAT PREVENTS PERPETUATION OF STUDENT ENROLLMENT</b>	Cover
<p>After a student has completed all the objectives of the course, he or she should not be allowed to reenroll in the course. There is, therefore, a need for a statement about the conditions for possible repetition of a course to prevent perpetuation of students in a particular program for an indefinite period of time.</p>	

## **ACKNOWLEDGMENTS**

Thanks to DAVID CRUZ and LUZ GRANADOS for developing and editing this course outline. Acknowledgment is also given to ERICA ROSARIO for designing the original artwork for the course covers. Gratitude also goes to CELIA DOMINGUEZ for her leadership in planning and facilitating this program.

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# **CALIFORNIA CAREER TECHNICAL EDUCATION MODEL CURRICULUM STANDARDS**

## **Marketing, Sales, and Services Industry Sector Knowledge and Performance Anchor Standards**

### **1.0 Academics**

Analyze and apply appropriate academic standards required for successful industry sector pathway completion leading to postsecondary education and employment. Refer to the Marketing, Sales, and Services academic alignment matrix for identification of standards

### **2.0 Communications**

Acquire and accurately use Marketing, Sales, and Services sector terminology and protocols at the career and college readiness level for communicating effectively in oral, written, and multimedia formats.

### **3.0 Career Planning and Management**

Integrate multiple sources of career information from diverse formats to make informed career decisions, solve problems, and manage personal career plans.

### **4.0 Technology**

Use existing and emerging technology to investigate, research, and produce products and services, including new information, as required in the Marketing, Sales, and Services sector workplace environment.

### **5.0 Problem Solving and Critical Thinking**

Conduct short, as well as more sustained, research to create alternative solutions to answer a question or solve a problem unique to the Marketing, Sales, and Services sector using critical and creative thinking, logical reasoning, analysis, inquiry, and problem-solving techniques.

### **6.0 Health and Safety**

Demonstrate health and safety procedures, regulations, and personal health practices and determine the meaning of symbols, key terms, and domain-specific words and phrases as related to the Marketing, Sales, and Services sector workplace environment.

### **7.0 Responsibility and Flexibility**

Initiate and participate in a range of collaborations demonstrating behaviors that reflect personal and professional responsibility, flexibility, and respect in the Marketing, Sales, and Services sector workplace environment and community settings.

### **8.0 Ethics and Legal Responsibilities**

Practice professional, ethical, and legal behavior, responding thoughtfully to diverse perspectives and resolving contradictions when possible, consistent with applicable laws, regulations, and organizational norms.

### **9.0 Leadership and Teamwork**

Work with peers to promote divergent and creative perspectives, effective leadership, group dynamics, team and individual decision making, benefits of workforce diversity, and conflict resolution as practiced in the DECA career technical student organization

### **10.0 Technical Knowledge and Skills**

Apply essential technical knowledge and skills common to all pathways in the Marketing, Sales, and Services sector, following procedures when carrying out experiments or performing technical tasks.

### **11.0 Demonstration and Application**

Demonstrate and apply the knowledge and skills contained in the Marketing, Sales, and Services anchor standards, pathway standards, and performance indicators in classroom, laboratory and workplace settings, and through the DECA career technical student organization.

## ***Marketing, Sales, and Services Pathway Standards***

### **B. Professional Sales Pathway**

Develop knowledge and skills in the theory and practice of sales designed to provide a professional foundation to those involved in personal selling careers, including the fundamentals of personal selling with an emphasis on customer behavior, persuasive presentation of ideas, products and services, and developing sales goals.

#### **Sample occupations associated with this pathway:**

- ◆ Customer Service Representative
- ◆ Retail Salesperson
- ◆ Sales Manager
- ◆ Real Estate Broker
- ◆ Fashion buyer

- B1.0 Understand the interrelationships between economic and marketing concepts and selling.
- B2.0 Analyze and evaluate legal, moral, and ethical issues affecting selling and sales management.
- B3.0 Analyze customer/client behavior in the selling process.
- B4.0 Understand the nature and scope of the functions associated with personal and business sales strategies, product knowledge, support activities, and management of selling techniques.
- B5.0 Examine different types of sales pathways.
- B6.0 Analyze the support activities of sales staff and management.
- B7.0 Complete a strategic plan that includes establishing individual and company sales goals to guide the activities of the sales staff.
- B8.0 Access and use marketing information to enhance sales opportunities and activities.

**CBE**  
**Competency-Based Education**

**COMPETENCY-BASED COMPONENTS**  
**for the Escrows Course**

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>A. PRE-ESCROW TRANSACTION COORDINATOR</p> <p>Understand the main role of a Transaction Coordinator.</p> <p>(2.5 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe the role of a Transaction Coordinator.</li> <li>2. List broker’s role in Transaction Coordinator supervision.</li> <li>3. Advantages of having a Transaction Coordinator.</li> <li>4. Types of Transaction Coordinator checklists systems.</li> <li>5. Requirements for a CAR® Designation of Certified Transaction Coordinators.</li> <li>6. Pass a test covering safe office procedures with a score of 100%</li> </ol>	<p><b>Career Ready Practice:</b> 2, 3, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.3 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway:</b> B2.1, B3.2, B3.3, B3.5, B3.6, B3.7, B4.1, B4.5, B4.6</p>
<p>B. EVALUATION—PRE-ESCROW TRANSACTION COORDINATOR</p>	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(0.5 hour)		<b>CTE Pathway:</b> B2.1, B3.2, B3.3, B3.5, B3.6, B3.7, B4.1, B4.5, B4.6
C. WHAT IS ESCROW  Know requirements of escrow holders.	<ol style="list-style-type: none"> <li>1. History of escrow.</li> <li>2. Explain contract law</li> <li>3. Requirement for escrow holder</li> <li>4. Professional organizations that support escrow agents</li> <li>5. Escrow holder’s behavior.</li> </ol>	<b>Career Ready Practice:</b> 2, 3, 5, 7, 8, 11, 12  <b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2  <b>CTE Pathway:</b> B3.2, B3.5, B3.6, B4.5
D. EVALUATION—WHAT IS ESCROW	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<b>Career Ready Practice:</b> 5  <b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1  <b>CTE Pathway:</b>



COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(0.5 hour)		B3.2, B3.5, B3.6, B4.5
<p>E. BASIC ESCROW PROCESSES &amp; THE ROLE OF A TRANSACTION COORDINATOR</p> <p>Understand the basic function of escrow.</p>	<ol style="list-style-type: none"> <li>1. Basic process in California.</li> <li>2. Explain six main escrow tasks.</li> </ol>	<p><b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway:</b> B3.2, B3.5, B3.6, B4.5</p>
(0.5 hour)	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p> <p><b>CTE Pathway:</b> B3.2, B3.5, B3.6, B4.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>G. TAKING THE ESCROW, PART 1</p> <p>Understand the different sections of escrow instructions.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe a sale escrow memo sheet.</li> <li>2. Explain bilateral escrow instructions.</li> <li>3. Explain unilateral escrow instructions.</li> <li>4. Describe the Explanation of Consideration section of the escrow instruction.</li> <li>5. Describe the Title Insurance Liability section of the escrow instruction.</li> <li>6. Describe the Instructions section of the escrow instruction.</li> <li>7. Describe the Memorandum section of the escrow instruction.</li> <li>8. Explain and describe the sections of a Grant Deed.</li> <li>9. Define Statement of Information.</li> <li>10. Define Commission Instructions.</li> </ol>	<p><b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway:</b> B2.1, B3.2, B3.5, B4.5</p>
<p>H. EVALUATION—TAKING THE ESCROW, PART 1</p> <p>(0.5 hour)</p>	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p> <p><b>CTE Pathway:</b> B2.1, B3.2, B3.5, B4.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>I. PROCESSING PHASE OF AN ESCROW</p> <p>Learn to review the check list thus keeping track of the escrow's progress.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>1. Define an Escrow Checklist.</li> <li>2. List important steps in accepting the deposit into escrow.</li> <li>3. Steps in accepting documents into escrow.</li> <li>4. Describe an Escrow Settlement Sheet.</li> <li>5. Describe amendments to escrow instruction.</li> <li>6. Define Title Insurance Order.</li> <li>7. Define Reconveyance.</li> <li>8. Describe the Pest Control Inspection Report.</li> <li>9. Name and define the causes of the most common wood damaging pests.</li> <li>10. List the two documents needed in termite inspections.</li> <li>11. Describe the importance of obtaining the buyer's approval.</li> </ol>	<p><b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway:</b> B2.4, B3.2, B3.3, B3.5, B3.6, B4.5</p>
<p>J. EVALUATION—PROCESSING PHASE OF THE ESCROW</p> <p>(0.5 hour)</p>	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p> <p><b>CTE Pathway:</b> B2.4, B3.2, B3.3, B3.5, B3.6, B4.5</p>
<p>K. PRELIMINARY REPORT OF TITLE FOR CLOSURE OF AN ESCROW</p>	<ol style="list-style-type: none"> <li>1. List steps in examining a Preliminary Report of Title.</li> <li>2. Define encumbrances.</li> <li>3. Define demand from beneficiary.</li> </ol>	<p><b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>Learn to complete the statements given in the Preliminary with the instructions to see that there are no conflicting facts; know how to proceed to close escrow.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>4. Compute adjustments to interest payments.</li> <li>5. Describe when obtaining the reconveyance is ordered.</li> <li>6. Define mortgage.</li> <li>7. Define fire insurance.</li> <li>8. Compute proration of property taxes.</li> <li>9. Describe loan fees.</li> <li>10. Describe title insurance fees.</li> <li>11. Describe pest control inspection fees.</li> <li>12. Describe escrow fees.</li> <li>13. List steps in obtaining buyer's fund.</li> <li>14. List the steps in closing escrow.</li> <li>15. Describe final escrow settlement.</li> </ol>	<p><b>CTE Anchor:</b>  Communications:  2.1, 2.2, 2.4  Problem Solving and Critical Thinking:  5.1, 5.2, 5.3, 5.4  Health and Safety:  6.6  Responsibility and Flexibility:  7.1, 7.6  Ethics and Legal Responsibilities:  8.2, 8.3, 8.4, 8.5, 8.8  Technical Knowledge and Skills:  10.1, 10.2</p> <p><b>CTE Pathway:</b>  B2.1, B3.2, B3.3, B3.5, B3.6, B4.6, B4.5</p>
<p>L. EVALUATION-- PRELIMINARY REPORT OF TITLE FOR CLOSURE OF AN ESCROW</p> <p>(0.5 hour)</p>	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b>  5</p> <p><b>CTE Anchor:</b>  Problem Solving and Critical Thinking:  5.2, 5.3, 5.4  Technical Knowledge and Skills:  10.1</p> <p><b>CTE Pathway:</b>  B2.1, B3.2, B3.3, B3.5, B3.6, B4.6, B4.5</p>
<p>M. TAKING THE ESCROW, PART 2</p>	<ol style="list-style-type: none"> <li>1. Define an Interim Binder.</li> <li>2. List the basic items of taking the escrow.</li> <li>3. Define Power of Attorney.</li> <li>4. Describe a Rent Statement.</li> </ol>	<p><b>Career Ready Practice:</b>  2, 5, 7, 8, 11, 12</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>Understand other documents that may be required in escrows.</p> <p>(2.5 hours)</p>	<p>5. List information needed in receiving cash into escrow.</p> <p>6. Describe assignment of water stock.</p>	<p><b>CTE Anchor:</b>  Communications:  2.1, 2.2, 2.4  Problem Solving and Critical Thinking:  5.1, 5.2, 5.3, 5.4  Health and Safety:  6.6  Responsibility and Flexibility:  7.1, 7.6  Ethics and Legal Responsibilities:  8.2, 8.3, 8.4, 8.5, 8.8  Technical Knowledge and Skills:  10.1, 10.2</p> <p><b>CTE Pathway:</b>  B3.2, B3.5, B3.6, B4.5</p>
<p>N. EVALUATION--TAKING THE ESCROW, PART 2</p> <p>(0.5 hour)</p>	<p>1. Pass a test.</p>	<p><b>Career Ready Practice:</b>  5</p> <p><b>CTE Anchor:</b>  Problem Solving and Critical Thinking:  5.2, 5.3, 5.4  Technical Knowledge and Skills:  10.1</p> <p><b>CTE Pathway:</b>  B3.2, B3.5, B3.6, B4.5</p>
<p>O. MID TERM EVALUATION</p>	<p>1. Pass a test.</p>	<p><b>Career Ready Practice:</b>  5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(1 hour)		<p><b>CTE Anchor:</b>            Problem Solving and Critical Thinking:            5.2, 5.3, 5.4            Technical Knowledge and Skills:            10.1</p> <p><b>CTE Pathway:</b>            B3.2, B3.5, B3.6, B4.5</p>
<p>P. TAKING THE ESCROW, PART 3</p> <p>Understand Title Insurance.</p> <p>(3.5 hours)</p>	<ol style="list-style-type: none"> <li>1. Define an Interim Binder</li> <li>2. Define easements</li> <li>3. Describe clearing Clouds in Title</li> <li>4. Define Title Insurance</li> <li>5. Define California Land Title Association (CLTA) Standard Coverage</li> <li>6. Define American Land Title Association (ALTA) Lender's Coverage</li> </ol>	<p><b>Career Ready Practice:</b>            2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b>            Communications:            2.1, 2.2, 2.4            Problem Solving and Critical Thinking:            5.1, 5.2, 5.3, 5.4            Health and Safety:            6.6            Responsibility and Flexibility:            7.1, 7.6            Ethics and Legal Responsibilities:            8.2, 8.3, 8.4, 8.5, 8.8            Technical Knowledge and Skills:            10.1, 10.2</p> <p><b>CTE Pathway:</b>            B2.1, B2.2, B3.5, B4.2</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>Q. EVALUATION-- TAKING THE ESCROW, PART 3</p> <p>(0.5 hour)</p>	<p>1. Pass a test.</p>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p> <p><b>CTE Pathway:</b> B2.1, B2.2, B3.5, B4.2</p>
<p>R. RECORDING AN ESCROW</p> <p>Understand the necessary steps in recording the escrow.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>1. Define a deed of trust.</li> <li>2. List different kind of Notes.</li> <li>3. Describe the Assignment of Water Stock.</li> <li>4. Compute adjustment and proration's of property taxes.</li> <li>5. Compute adjustment and proration's of water stocks.</li> <li>6. Compute adjustments and proration's of fire insurance.</li> <li>7. Compute adjustments and proration's of rents.</li> <li>8. List steps in balancing the accounts.</li> <li>9. Define Calling for Recording.</li> <li>10. Develop seller's closing letter.</li> <li>11. Develop buyer's closing letter.</li> <li>12. Describe other disbursement.</li> </ol>	<p><b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway:</b> B3.2, B3.5, B3.6, B4.5</p>
<p>S. EVALUATION—RECORDING AN ESCROW</p>	<p>1. Pass a test.</p>	<p><b>Career Ready Practice:</b> 5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(0.5 hour)		<p><b>CTE Anchor:</b>            Problem Solving and Critical Thinking:            5.2, 5.3, 5.4            Technical Knowledge and Skills:            10.1</p> <p><b>CTE Pathway:</b>            B3.2, B3.5, B3.6, B4.5</p>
<p>T. TAKING THE ESCROW, PART 4</p> <p>Understand the escrow instructions pertaining to beneficiary’s statement with “Assumed” or “Subject to” clauses.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>1. Understanding the escrow instructions.</li> <li>2. List steps in preparing a broker’s mailing.</li> <li>3. List steps in ordering the Title Report.</li> <li>4. Define ‘Assumed’ in beneficiary’s statement.</li> <li>5. Define ‘Subject to’ in beneficiary’s statement.</li> <li>6. Differentiate “Wraparound” or “All-inclusive” deed of trust.</li> <li>7. Define homestead.</li> <li>8. Describe how to read a Section Map.</li> </ol>	<p><b>Career Ready Practice:</b>            2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b>            Communications:            2.1, 2.2, 2.4            Problem Solving and Critical Thinking:            5.1, 5.2, 5.3, 5.4            Health and Safety:            6.6            Responsibility and Flexibility:            7.1, 7.6            Ethics and Legal Responsibilities:            8.2, 8.3, 8.4, 8.5, 8.8            Technical Knowledge and Skills:            10.1, 10.2</p> <p><b>CTE Pathway:</b>            B2.2, B3.2, B3.5, B3.6, B4.2</p>



COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>U. EVALUATION-- TAKING THE ESCROW, PART 4</p> <p>(0.5 hour)</p>	<p>1. Pass a test.</p>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p> <p><b>CTE Pathway:</b> B2.2, B3.2, B3.5, B3.6, B4.2</p>
<p>V. TAKING THE ESCROW, PART 5</p> <p>Understand the escrow instruction involving second deed of trust and note.</p> <p>(4 hours)</p>	<p>1. Understand the second page of the Preliminary Report of Title. 2. Describe a second deed of trust and note. 3. Explain procedure for handling funds for work not completed. 4. Complete the Settlement Sheet. 5. Describe procedures for Final Settlement for buyer and seller. 6. Describe other disbursements.</p>	<p><b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway:</b> B2.1, B3.2, B3.5, B3.6, B4.2</p>
<p>W. EVALUATION-- TAKING THE ESCROW, PART 5</p>	<p>1. Pass a test.</p>	<p><b>Career Ready Practice:</b> 5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(0.5 hour)		<p><b>CTE Anchor:</b>            Problem Solving and Critical Thinking:            5.2, 5.3, 5.4            Technical Knowledge and Skills:            10.1</p> <p><b>CTE Pathway:</b>            B2.1, B3.2, B3.5, B3.6, B4.2</p>
<p>X. EXCHANGE ESCROWS</p> <p>Demonstrate the escrow instructions involving exchanges.</p>	<ol style="list-style-type: none"> <li>1. Describe an Exchange.</li> <li>2. Describe the tax benefits of an Exchange.</li> <li>3. Describe Exchange Deposit Receipt.</li> <li>4. Determine Consideration.</li> <li>5. Prepare escrow instructions for an exchange.</li> <li>6. Valuate properties.</li> <li>7. Explain the number of deeds in an exchange.</li> <li>8. Describe the Beneficiary’s Statements or properties to be exchanged.</li> </ol>	<p><b>Career Ready Practice:</b>            5</p> <p>Communications:            2.1, 2.2, 2.4            Problem Solving and Critical Thinking:            5.1, 5.2, 5.3, 5.4            Health and Safety:            6.6            Responsibility and Flexibility:            7.1, 7.6            Ethics and Legal Responsibilities:            8.2, 8.3, 8.4, 8.5, 8.8            Technical Knowledge and Skills:            10.1, 10.2</p> <p><b>CTE Pathway:</b>            B2.1, B3.2, B3.5, B3.6, B4.2</p>
<p>Y. EVALUATION—EXCHANGE ESCROWS</p>	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b>            5</p> <p><b>CTE Anchor:</b>            Problem Solving and Critical Thinking:            5.2, 5.3, 5.4</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(0.5 hour)		Technical Knowledge and Skills: 10.1  <b>CTE Pathway:</b> B2.1, B3.2, B3.5, B3.6, B4.2
Z. PROCESSING THE EXCHANGE ESCROW  Understand the Exchange Escrow process and filing systems.	<ol style="list-style-type: none"> <li>1. Complete the Progress and Settlement Sheets.</li> <li>2. Demonstrate how to file using the Indexing and Tickler System.</li> <li>3. Describe the Decree of Death.</li> <li>4. Describe Estate Taxes.</li> <li>5. Describe probate process.</li> </ol>	<b>Career Ready Practice:</b> 2, 5, 7, 8, 11, 12  <b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2  <b>CTE Pathway:</b> B2.1, B3.2, B3.5, B3.6, B4.2
(3 hours)	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<b>Career Ready Practice:</b> 5  <b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1



COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>DD. PROCESSING THE NOTE AND TRUST DEED ESCROW</p> <p>(2.5 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe altering a Standard Escrow Instructions form.</li> <li>2. Name and define Negotiable Instruments Law.</li> <li>3. Describe usury law.</li> <li>4. Describe collateral assignment.</li> </ol>	<p><b>Career Ready Practice:</b> 12, 5, 7, 8, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.1, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.8 Technical Knowledge and Skills: 10.1, 10.2</p> <p><b>CTE Pathway</b> B2.1, B3.2, B3.5, B3.6, B4.2</p>
<p>EE. EVALUATION-- PROCESSING THE NOTE AND TRUST DEED ESCROW</p> <p>(0.5 hour)</p>	<ol style="list-style-type: none"> <li>1. Pass a test.</li> </ol>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1</p> <p><b>CTE Pathway:</b> B2.1, B3.2, B3.5, B3.6, B4.2</p>
<p>FF. EMPLOYABILITY SKILLS</p>	<ol style="list-style-type: none"> <li>1. Describe the steps in a job search.</li> <li>2. Write a résumé and cover letter; describe the value of résumés and personal networking in obtaining employment.</li> <li>3. Complete a job application form legibly.</li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>Demonstrate competency in job search and acquisition skills.</p> <p>(1 hour)</p>	<ol style="list-style-type: none"> <li>4. Demonstrate work habits: punctuality and regular attendance.</li> <li>5. Describe job interview preparation: dress, references, résumé, transcripts, work permit, interview, and follow-up.</li> <li>6. Participate in a mock interview as an applicant and describe employee’s point of view.</li> <li>7. Participate in a mock interview as an employer and describe employer’s point of view.</li> <li>8. Describe civil, age and equal rights in employment and what constitutes discriminatory hiring practices.</li> <li>9. Describe employer’s rights: attendance, punctuality, attitude, grooming, honesty, industrial safety, substance abuse.</li> <li>10. Describe statutory, compensatory and employer-sponsored benefits.</li> <li>11. Define gross/net pay; federal, state, FICA, SDI taxes and the W-4 form.</li> <li>12. Describe customer service as a method of building permanent relationships between the organization and the customer.</li> </ol>	<p><b>CTE Anchor:</b></p> <p>Communications: 2.1, 2.2, 2.3, 2.4, 2.5</p> <p>Career Planning and Management: 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9</p> <p>Technology: 4.3, 4.4, 4.5</p> <p>Problem Solving and Critical Thinking: 5.1, 5.3, 5.4</p> <p>Health and Safety: 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 6.7</p> <p>Responsibility and Flexibility: 7.1, 7.2, 7.3, 7.4, 7.6, 7.7</p> <p>Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.5, 8.6, 8.8</p> <p>Leadership and Teamwork: 9.1, 9.2, 9.3, 9.4, 9.5, 9.6, 9.7</p> <p>Technical Knowledge and Skills: 10.1, 10.2, 10.15</p> <p>Demonstration and Application: 11.2, 11.5</p> <p><b>CTE Pathway:</b> B2.4, B3.7, B4.1,</p>
<p>GG. FINAL EVALUATION</p> <p>Pass a comprehensive exam covering the basic terms, process, ethics, and theory of escrow.</p>	<ol style="list-style-type: none"> <li>1. Demonstrate knowledge acquired by passing, with a minimum grade of 70%, a final examination covering the complete course under conditions as prescribed by the California Department of Real Estate.</li> </ol>	<p><b>Career Ready Practice:</b> 5</p> <p><b>CTE Anchor:</b> Problem Solving and Critical Thinking: 5.2, 5.3, 5.4</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(2 hours)		Technical Knowledge and Skills: 10.1  <b>CTE Pathway:</b> B2.1, B3.2, B3.3, B3.5, B3.6, B3.7, B4.1, B4.5, B4.6

## ***SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES***

### **TEXTBOOKS**

Walt Huber, Joe Newton, and Anita Rubeck, Escrow 1 Introducing Transaction Coordinators, 5h Edition, Educational Textbook Company, Inc., 2017.

### **RESOURCES**

Employer Advisory Board members

California Department of Real Estate (DRE), [www.bre.ca.gov](http://www.bre.ca.gov)

Bureau of Labor Statistics, U.S. Department of Labor. *Occupational Outlook Handbook, 2010-11 Edition*.

CDE Model Curriculum Standards for Marketing, Sales, and Services  
<http://www.cde.ca.gov/ci/ct/sf/documents/mktsaleservices.pdf>

### **COMPETENCY CHECKLIST**



## **TEACHING STRATEGIES and EVALUATION**

### **METHODS AND PROCEDURES**

- A. Lectures and discussions
- B. Demonstrations
- C. Individualized Instruction
- D. Multimedia Presentations
- E. Critical thinking and listening skills

### **EVALUATION**

SECTION A – Pre-escrow Transaction Coordinator – Pass a safety test with a score off 100%

SECTION B – Evaluation--Pre-Escrow Transaction Coordinator – Pass a test with a minimum score of 80% or higher.

SECTION D– Evaluation—What is Escrow – Pass a test with a minimum score of 80% or higher.

SECTION F – Evaluation—Escrow processes and role of a Transaction Coordinator – Pass a test with a minimum score of 80% or higher.

SECTION H – Evaluation—Taking the Escrow, Part 1 – Pass a test with a minimum score of 80% or higher.

SECTION J – Evaluation—Processing phase of the Escrow – Pass a test with a minimum score of 80% or higher.

SECTION L – Evaluation—Preliminary Report of Title for closure of an Escrow – Pass a test with a minimum score of 80% or higher.

SECTION N – Evaluation—Taking the Escrow, Part 2 – Pass a test with a minimum score of 80% or higher.

SECTION O – Evaluation—Mid Term Evaluation – Pass a test with a minimum score of 80% or higher.

SECTION Q – Evaluation—Taking the Escrow, Part 3 – Pass a test with a minimum score of 80% or higher.

SECTION S – Evaluation—Recording an Escrow – Pass a test with a minimum score of 80% or higher.

SECTION U – Evaluation—Taking the Escrow, Part 4 – Pass a test with a minimum score of 80% or higher.

SECTION W – Evaluation—Taking the Escrow, Part 5 – Pass a test with a minimum score of 80% or higher.

SECTION Y – Evaluation—Exchange Escrows – Pass a test with a minimum score of 80% or higher.

SECTION AA – Evaluation—Process the Exchange Escrow – Pass a test with a minimum score of 80% or higher.

SECTION CC – Evaluation—Note and Trust Deed Escrow – Pass a test with a minimum score of 80% or higher

SECTION EE – Evaluation—Processing the Note and Trust Deed Escrow – Pass a test with a minimum score of 80% or higher.

SECTION GG – Final Evaluation – Pass a final exam covering the complete course under conditions as prescribed by the California Department of Real Estate with a minimum score of 70% or higher.

## ***Standards for Career Ready Practice***

**1. Apply appropriate technical skills and academic knowledge.**

Career-ready individuals readily access and use the knowledge and skills acquired through experience and education. They make connections between abstract concepts with real-world applications and recognize the value of academic preparation for solving problems, communicating with others, calculating measures, and performing other work-related practices.

**2. Communicate clearly, effectively, and with reason.**

Career-ready individuals communicate thoughts, ideas, and action plans with clarity, using written, verbal, electronic, and/or visual methods. They are skilled at interacting with others: they are active listeners who speak clearly and with purpose, and they are comfortable with terminology that is common to workplace environments. Career-ready individuals consider the audience for their communication and prepare accordingly to ensure the desired outcome.

**3. Develop an education and career plan aligned with personal goals.**

Career-ready individuals take personal ownership of their educational and career goals and manage their individual plan to attain these goals. They recognize the value of each step in the educational and experiential process, and they understand that nearly all career paths require ongoing education and experience to adapt to practices, procedures, and expectations of an ever-changing work environment. They seek counselors, mentors, and other experts to assist in the planning and execution of education and career plans.

**4. Apply technology to enhance productivity.**

Career-ready individuals find and maximize the productive value of existing and new technology to accomplish workplace tasks and solve workplace problems. They are flexible and adaptive in acquiring and using new technology. They understand the inherent risks—personal and organizational—of technology applications, and they take actions to prevent or mitigate these risks.

**5. Utilize critical thinking to make sense of problems and persevere in solving them**

Career-ready individuals recognize problems in the workplace, understand the nature of the problems, and devise effective plans to solve the problems. They thoughtfully investigate the root cause of a problem prior to introducing solutions. They carefully consider options to solve a problem and, once agreed upon, follow through to ensure the problem is resolved.

**6. Practice personal health and understand financial literacy.**

Career-ready individuals understand the relationship between personal health and workplace performance. They contribute to their personal well-being through a healthy diet, regular exercise, and mental health activities. Career-ready individuals also understand that financial literacy leads to a secure future that enables career success.

**7. Act as a responsible citizen in the workplace and the community.**

Career-ready individuals understand the obligations and responsibilities of being a member of a community and demonstrate this understanding every day through their interactions with others. They are aware of the impacts of their decisions on others and the environment around them, and they think about the short-term and long-term consequences of their actions. They are reliable and consistent in going beyond minimum expectations and in participating in activities that serve the greater good.

**8. Model integrity, ethical leadership, and effective management.**

Career-ready individuals consistently act in ways that align with personal and community-held ideals and principles. They employ ethical behaviors and actions that positively influence others. They have a clear understanding of integrity and act on this understanding in every decision. They use a variety of means to positively impact the direction and actions of a team or organization, and they recognize the short-term and long-term effects that management's actions and attitudes can have on productivity, morale, and organizational culture.

**9. Work productively in teams while integrating cultural and global competence.**

Career-ready individuals contribute positively to every team, as both team leaders and team members. To avoid barriers to productive and positive interaction, they apply an awareness of cultural differences. They interact effectively and sensitively with all members of the team and find ways to increase the engagement and contribution of other members.

**10. Demonstrate creativity and innovation.**

Career-ready individuals recommend ideas that solve problems in new and different ways and contribute to the improvement of the organization. They consider unconventional ideas and suggestions by others as solutions to issues, tasks, or problems. They discern which ideas and suggestions may have the greatest value. They seek new methods, practices, and ideas from a variety of sources and apply those ideas to their own workplace practices.

**11. Employ valid and reliable research strategies.**

Career-ready individuals employ research practices to plan and carry out investigations, create solutions, and keep abreast of the most current findings related to workplace environments and practices. They use a reliable research process to search for new information and confirm the validity of sources when considering the use and adoption of external information or practices.

**12. Understand the environmental, societal, and economic impacts of decisions.**

Career-ready individuals understand the interrelated nature of their actions and regularly make decisions that positively impact other people, organizations, the workplace, and the environment. They are aware of and utilize new technologies, understandings, procedures, and materials and adhere to regulations affecting the nature of their work. They are cognizant of impacts on the social condition, environment, workplace, and profitability of the organization.

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## Statement for Civil Rights

All educational and vocational opportunities are offered without regard to race, color, national origin, gender, or physical disability.

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