

Disclaimer

What You Can Expect From Us

These forms contain general legal information and do not contain legal advice. The authors and publishers are not attorneys or law firms nor a substitute for either. The law is complex and changes often. For legal advice, ask an attorney. The forms book further reflects those in the other books in this module. It is written for educational purposes only.

You are free to provide these samples to an attorney for review. When collaborating with an attorney where there is relationship building involved, and a form is needed, you might ask the attorney if he would like to review a sample form.

This publication has been designed to provide accurate and authoritative information regarding the subject matter covered. No material in this course is given as a recommendation, offer or solicitation for the purchase or sale of any property.

This disclaimer has been prepared to eliminate classic examples of misunderstandings regarding the use of course materials and their presentation to the land trust collaborator client. This applies to Dispute Resolution Collaborative, LLC; The Larner Global Group; Friends of Espresso, LLC; Thanks a Latte, LLC, Saul Larner, Ph.D., LL.M.,MBA and Be Prepared Publishers.

There should be no misleading information. In other words, there should be nothing in the course materials that would lead a reasonable person to develop

unjustified expectations regarding case outcomes. This may include direct comparisons of various strategies.

Frequently, at our public appearances and webinars, we may feature testimonials from individuals familiar with our products and services. We will curtail any testimonials from being sensational and misleading. The user should keep in mind that a client's individual case is not necessarily applicable across all states.

Introduction

All information provided in the course materials or any of our websites is provided in good faith. However, we make no representations or warranty, express or implied, regarding the accuracy, adequacy, validity, reliability, suitability, or completeness of any information therein.

Legal Disclaimer As To Legal Advice

The legal information provided is for general, informational and educational purposes only and should not be considered a substitute for legal professional legal advice. The opinions expressed herein are those of the author and do not necessarily reflect the view or others. Further, if you are a client, we will in all probability give you materials written or approved by an attorney. While we strive to provide accurate and timely information, it may not reflect your client's circumstances. Therefore, we encourage you to seek professional legal counsel before making any decisions based on the information you gather from your client.

If you are concerned about your actions considered to be the unauthorized practice of law, please refer to the description of your role as a collaborator as described in the collaborator guide and this handbook.

If you are an LDA, (Legal Document Assistant), you are aware of the authorized practice of law rules. You know that you need to follow various requirements which are set forth in the California Business Professions Code 6400 to 6456 and in all probability you are a member of CALDA. (California Association of Legal Document Assistants). You must represent initially to your client that you are not an attorney and have the client sign the form as set forth in the business and professional code and attached herein the forms section to use intact with the Land Trust Collaborator agreement.

The State Bar of California has approved Trust It! in its first edition which describes in full detail the 40 advantages of the land trust. It has been approved **for teaching for CLE credits. However, it is against their policy to endorse any of the CLE courses which they approve of.**

If You are A Real Estate Broker

If you are a real estate broker in California, you may refer to 2024 California Code Business and Professional Code—BPC Division 3-Professions and Vocations. Generally. Chapter 5.5 Legal Document Assistants and unlawful detainer assistants. Article 1-General Provisions 6400. We suggest you read the entire code.

Under 6400 (d) section 1 (it is stated that “self help service” the following):

1. Providing general published factual information that has been written or approved by an attorney, pertaining legal procedures, rights or obligations to a person who is representing themselves in a legal matter, to assist the person in representing themselves. **This service, in and of itself does not require registration as a legal document assistant.** However, I suggest you discuss this with your attorney to clarify the meaning of this paragraph and subdivision as well as rules regarding compensation when using your real estate license as there are some gray areas.

In addition to this, you may wish to call the California Association of Realtors legal hotline and ask if you can fill in any forms if they have been approved by an attorney.