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FEATURE

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LEGISLATIVE UPDATE:
WHAT LEGAL PROFESSIONALS NEED TO KNOW FOR 2027

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The LEGAL PROFESSIONAL®
The Official Publication of Legal Professionals Incorporated

SUMMER 2026 • VOLUME 81, ISSUE 2
Published Quarterly by Legal Professionals Incorporated (LPI)

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THE LEGAL PROFESSIONAL®, published quarterly by Legal Professionals Incorporated, is a benefit of membership. Electronic subscriptions for members are automatically distributed. Printed subscriptions are available to members, at a cost of $50 per year (4 quarterly issues), and to non-members at a cost of $75 per year, through LPI Corporate Office, P.O. Box 2582, Granite Bay, CA 95746.

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Publication date: November 2026

FROM SCHOLARSHIP RECIPIENT TO EXECUTIVE ADVISOR:

HOW LPI SHAPED MY CAREER AT NIXON PEABODY

By Donna Day
Executive Advisor 2026-2028, Legal Professionals Incorporated
LPI Past President 2024-2026

When I walked across the stage at my high school graduation in 1986, I had no idea that a scholarship from the Alameda County Legal Secretaries Association would set the course for the next four decades of my life. That single moment — being recognized by a local chapter of Legal Professionals Incorporated — opened a door into a profession and a community that has shaped who I am today, both as a legal professional and as a leader.

Nearly forty years later, I am serving as Executive Advisor on LPI's Executive Committee, having completed a ten-year leadership journey that most recently included serving as President of LPI. Looking back, I can trace nearly every meaningful step of my career at Nixon Peabody to the foundation LPI built in me.

A Brief Look at Why LPI Exists

To appreciate what LPI has meant to my career, it helps to understand why this association was formed in the first place. Founded in 1934 as Legal Secretaries, Incorporated, and later rebranded as Legal Professionals Incorporated to reflect the evolving scope of our work, LPI was created at a time when legal secretaries had no dedicated professional organization, no standardized training, and limited access to continuing education.

The founders understood something that remains true today: the legal support profession needed a home. A place to learn, to set standards, to earn credentials, to network, and to have a collective voice. Through its network of local chapters feeding into a statewide structure, LPI has provided exactly that — grassroots community combined with large-scale professional resources.

That founding mission matters now more than ever. Unlike paralegals, legal secretaries and today's Practice Assistants have no formal degree program or required credentialing pathway.

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PRESIDENT'S MESSAGE

LPI PRESIDENT BETTINA HERRICK-JACOBSON

Empowering Legal Professionals Through Knowledge and Connection

Happy Fall—my favorite time of year! I love the beautiful colors, the cooler weather, and knowing the holiday season is right around the corner. If you attended our annual conference in May, then you know exactly what I mean.

This past February, the Governors voted to amend Bylaw Article XIV, Section 4(a) to allow the August Conference to be virtual. That change became effective this past August. This year, LPI held its second-ever fully virtual conference—the first of many to come. The conference was 100% virtual, and we also switched things up: our educational seminars were held in the morning, with the Board of Governors meeting in the afternoon. Going into this conference as President, I'll be honest—I was nervous. A fully virtual conference and a new schedule made it even more so. In the end, I truly believe it was a success.

We were fortunate to offer three outstanding educational seminars, each taught by incredible instructors: Trust Administration, Law Office Administration, and Family Law. If you missed any of the seminars from our August conference, you can order them from the LPI website under *Webinars on Demand*.

And you won't want to miss what our Educational Council has planned next. Our Second Quarterly Conference—"Fall Into Excellence, Gather–Grow–Thrive"—will take place November 6–8, 2026, at the DoubleTree by Hilton, Pomona. During the seminars, you will learn about "Bite, Bytes, and Benchmarks." Please bring your laptop, as the seminar will be interactive. We will also cover "Pulled over or DUI: What happens Next", followed by a luncheon session focused on shifting from fight-or-flight to focus and well-being.

As we did previously, we will hold educational seminars in the morning and the Board of Governors meeting in the afternoon. Please review the conference schedule included in the Official Notice that was sent out. We want to ensure you don't miss any of the events during conference.

In other updates, the Dues Collections program is now up and running. We made a few adjustments to address some early issues, but things are running smoothly now. If your association opted in, your members will renew or sign up directly on the LPI website. If your association opted out, members will need to contact your membership chair to inquire about signing up.

My theme this term has been **Empowering Legal Professionals Through Knowledge and Connection**. The knowledge part comes from the educational webinars, seminars, and multi-week classes LPI offers. The connection part comes from our conferences and local association events. Connection means not only connecting with one another, but also connecting LPI with professionals who may not yet know who we are—or what we stand for.

This past October, I attended the California Association of Legal Document Assistants (CALDA) annual conference with LPI Executive Secretary Larry McGrew. We were able to reintroduce LPI to Legal Document Assistants and, in many cases, introduce LPI for the first time. We truly enjoyed making those connections with attendees.

As I continue serving in this role, I want to revisit the focus areas I shared and hold myself accountable to them throughout my presidency:

- enhancing visibility and digital presence, while exploring new ways to reach prospective members;
- expanding educational programming, including webinars, workshops, conferences, and continuing education opportunities for legal professionals at every career stage;
- strengthening connection and collaboration among members statewide—so knowledge, support, and opportunity are shared broadly and equitably.

We are making progress. Our social media presence has grown significantly, and our Social Media Chair, Jasmine Powers, will be sharing numbers and exciting updates soon. Our educational programming continues to strengthen, and the one area I believe will make the biggest difference for all of us is connection—because it's something we create together. Please make connection a priority. Attend your local association meetings, whether they are education meetings or fun events. Invite colleagues from your office. And attend events hosted by our sister associations.

I hope to connect with many of you at our Second Quarterly Conference in Pomona!



Bettina Herrick-Jacobson
LPI President 2026-2028
President@LegalProfessionalsInc.org

Elected President of Legal Professionals Incorporated (LPI) in May 2026, Bettina is also a member of Placer County Legal Professionals Association. She completed the ABA-Approved Paralegal Studies Program at MTI College in 2012 and began her legal career with the Nevada County Superior Court, working in the Civil and Family Law Department. In 2022, she joined the Sacramento County Superior Court, where she now serves in the Family Law and Probate Department. Bettina brings extensive court experience and a strong commitment to professionalism, education, leadership, and service within the legal community.



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Speaker
BETHANY ENSZ

Bethany S. Ensz, M.S., is a Legal Research and Analysis instructor at UCSD Division of Extended Studies. She previously worked as a corporate paralegal and office manager at Breakwater Law Group, LLP, and held positions at Sheppard Mullin and McKenna Long & Aldridge LLP (now Dentons).

Bethany holds a B.S. in Criminal Justice with a minor in Psychology from Indiana University and an M.S. in Legal Studies from the University of San Diego School of Law. She earned her paralegal certificate from UC San Diego Division of Extended Studies, where she was inducted into the LEX Honor Society.

She is also a Certified Personal Trainer and Corrective Exercise Specialist through the National Academy of Sports Medicine (NASM).



This webinar is approved for California Minimum Continuing Legal Education (MCLE) **credit** in the amount of **1.0 credit hour**, including **1.0 credit** hour of **ethics** credit. This webinar is also approved for **1.0 hour** of CCLS credit.

For more information or to register, visit **www.legalprofessionalsinc.org**



LEGISLATIVE ALERT!

BY LYNNE PRESCOTT, CCLS

Contributing Editor, *The Legal Professional*®

Legislative Update: What Legal Professionals Need to Know for 2027

The end of every legislative session brings new laws, amended laws, and even the repeal of certain laws. Governor Gavin Newsom's September 30 deadline to act on legislation from the 2025–2026 Regular Session has passed. Many measures enacted during 2026 will take effect January 1, 2027; others became effective immediately, have later operative dates, or modify legislation enacted in 2025 that was already scheduled to become operative in 2027.

However, a legislative update should be about more than identifying which bills were signed by the Governor. It means taking a look beyond the bill numbers and considering how the changes affect the work. What changed? When does it change? What does it mean for my practice? And what do I need to do differently?

CIVIL LITIGATION AND PROCEDURE

AB 540: Electronic Service of Motions

This legislation amends California Code of Civil Procedure sections 437c, 1005, and 1010.6 to clarify that electronic service of a notice of motion **does not require the additional notice period** otherwise associated with certain methods of service.

Specific statutory amendments

The following are the relevant provisions in the chaptered legislation:

Code Section	Amendment and Effect
CCP § 437c(a)(2)	Adds the words "excluding electronic service" to the provision requiring two additional court days for specified delivery methods. Electronic service of an MSJ/MSA therefore **does not** increase the 81-day notice period.
CCP § 1005(b)	Adds "excluding electronic service" to the provision requiring two additional calendar days for specified delivery methods. Electronic service therefore **does not** increase the 16-court-day notice period for regular motions.
CCP § 1010.6(a)(3)	Makes a conforming change to the general two-court-day electronic-service extension, establishing the exception for notices of motion governed by §§ 437c and 1005.



Practical Calendaring Implications

For motions governed by these provisions, assuming proper electronic service and no other applicable order or statutory exception:

- Regular motions: 16 court days' notice, without additional electronic-service days.
- Motions for summary judgment/adjudication: 81 days' notice, without additional electronic-service days.
- Opposition and reply deadlines: Continue to apply the specific statutory deadlines, including 9 and 5 court days under § 1005 and 20 and 11 days under § 437c.

Effective date: January 1, 2027, under the ordinary effective-date rule for statutes enacted at the 2026 regular session.

This is particularly important for litigation calendaring because it addresses the distinction between the statutory notice period for a motion and the two-court-day extension generally associated with electronic service.

One important practice consideration: the amendment concerns the additional notice period, not a wholesale elimination of electronic-service extensions for other litigation deadlines.

AB 747 and AB 2042: Major Changes to Service of Process (The SPARE Act)

Perhaps no civil procedure development deserves more attention heading into 2027 than implementation of **AB 747, the Service of Process Accountability, Reform and Equity (SPARE) Act**, together with important cleanup legislation enacted in 2026 through **AB 2042**.

AB 747 (Chapter 563, Statutes of 2025) becomes operative January 1, 2027. It amends numerous service-of-process provisions, including Code of Civil Procedure sections 415.20, 415.45, 417.10, 417.40, 473, 473.5, and 585, and adds section 473.2.

Among other changes, the legislation establishes standards for "reasonable diligence" in specified circumstances before resorting to substituted service and adds documentation requirements to specified proofs of service, including photographic and location information, subject to statutory exceptions.

Of particular importance to litigators, new Code of Civil Procedure section 473.2 establishes procedures for challenging defaults and default judgments based upon allegedly improper service. After AB 747 was enacted, however, questions arose regarding how the new default-relief provisions would apply during the transition into 2027.

Enter **AB 2042 (Chapter 379, Statutes of 2026)**.

AB 2042 amends Code of Civil Procedure sections 417.10 and 473.2 and clarifies the application of the new law. Most importantly, section 473.2 applies to **service attempted or completed on or after January 1, 2027**. The legislation preserves existing judicial authority to grant relief involving earlier service.

That distinction matters. The triggering event is not simply when someone files the proof of service. The new statutory framework looks to when service was attempted or completed.

2027 PRACTICE ALERT: SERVICE OF PROCESS

Do not rely solely on what you learned about the SPARE Act when AB 747 passed in 2025. The Legislature revisited the law through AB 2042, including an important clarification concerning its application to service occurring before January 1, 2027.



Before January 1: Review process-server instructions, proofs of service, service checklists, default procedures, forms, and internal workflows. Remember that the changes can reach beyond general civil litigation into family, probate, unlawful detainer, and other proceedings.

SB 174: Remote Civil Appearances Continue

Remote appearances remain part of California litigation practice. **SB 174** modifies and extends the statutory framework governing remote civil proceedings under Code of Civil Procedure section 367.75.

Unlike most legislation discussed in this update, SB 174 became effective during 2026. Among its provisions, when a court requires an in-person appearance where a remote appearance otherwise may be available, the court must provide a reason.

Practice Impact: Do not assume either that an appearance will be remote or that remote proceedings are disappearing. Continue checking the court's order, local procedures, department instructions, and appearance information when calendaring and preparing for hearings.

AB 2262: Judicial Disqualification Procedure

Sometimes a relatively small procedural change is exactly the one most likely to cause trouble if nobody knows about it.

AB 2262 modifies the procedure for serving a verified statement seeking judicial disqualification. The new procedure addresses service during regular business hours at the courthouse where the judge is sitting and permits service on a clerk's designee under specified circumstances.

Practice Impact: This is the kind of assignment that may arrive with the words, “Please get this filed and served today.” Before proceeding, confirm that both filing and service comply with the new procedure.

AB 1950: Court-Ordered Mediation—Watch the Geography

AB 1950 concerns court-ordered mediation, but an important limitation should not be overlooked: its expanded procedure applies to **Los Angeles Superior Court**, not statewide.

Under specified circumstances, Los Angeles Superior Court may send otherwise qualifying civil cases to mediation without the new $75,000 amount-in-controversy limitation that otherwise would apply. The legislation provides for up to three hours of court-sanctioned mediation without cost, permits remote participation, and provides that mediation cannot be used to delay trial or other expedited procedures.

Practice Impact: Read beyond the bill title. A procedural statute may apply statewide, only in a particular county, or only to particular proceedings.

FILING FEES, REFUNDS, AND PUBLICATION

Several additional measures affect the less glamorous—but very real—mechanics of civil practice.

AB 2781 Specified Filing Fee Thresholds

AB 2781 addresses specified filing fee thresholds, including fees in small-claims and limited-civil matters. Legal professionals should verify applicable fees rather than automatically carrying 2026 amounts and assumptions into 2027.



AB 1951: Refund of Filing Fees

AB 1951 establishes a procedure under which a responding party may obtain a refund of a filing fee in specified circumstances involving a deficient initiating filing. Of particular importance for calendaring, a qualifying written refund request generally must be made within **20 days after the court mails notice**.

Practice Impact: When a court notice arrives concerning an unsuccessful or deficient initiating filing, do not simply route it as correspondence. Determine immediately whether the client's filing fee may be refundable and whether a deadline must be calendared.

AB2323: Legal Publication Practice

AB 2323 also changes legal-publication practice by requiring specified public notices published in newspapers of general circulation to appear in both the print publication and the newspaper's internet or electronic publication.

For offices handling probate notices, summons by publication, name changes, real-property matters, or other proceedings requiring publication, confirming compliance should become part of the publication workflow.

DON'T FORGET: EARLIER LAWS TAKING EFFECT IN 2027

Not every important January 1 change was enacted in 2026.

AB 515: Statements of Decision

AB 515 (Chapter 559, Statutes of 2025) amends Code of Civil Procedure sections 632 and 664, with its new statement-of-decision procedure becoming operative January 1, 2027. Under existing procedure, the timing for requesting a statement of decision depends upon the length of the trial. Beginning January 1, that distinction disappears.

Regardless of trial length, the request must be made **before the matter is submitted for decision**. It must be made in writing or orally where there is an official record of the proceeding being transcribed. The legislation also authorizes a court to issue a written statement of decision without a party's request and makes additional procedural changes concerning statements of decision and entry of judgment.

Practice Tip: Add the statement-of-decision issue to your bench-trial checklist. Do not wait until after submission to ask whether the attorney wants one.

LEGAL PRACTICE, TECHNOLOGY, AND ARTIFICIAL INTELLIGENCE

SB 574: AI May Assist the Legal Team—It Does Not Become the Legal Team

Generative artificial intelligence continues to reshape legal practice, and SB 574 (Chapter 858, Statutes of 2026) directly addresses its use by attorneys and other participants in California's justice system. The legislation amends Business and Professions Code section 6173 and Code of Civil Procedure section 128.7 and adds Business and Professions Code section 6068.1 and Code of Civil Procedure sections 180 and 1282.1.

Among other requirements, the law addresses confidentiality when attorneys use generative AI, verification of AI-generated material, and attorney responsibility for citations and other content submitted to a court. It also addresses the use of generative AI by arbitrators, judicial officers, and alternative dispute resolution providers.



The underlying principle is straightforward:

AI may assist the legal team. It does not become the legal team.

Practice Impact: Firms should have clear procedures governing AI-assisted research, drafting, citations, confidential information, verification, attorney review, and supervision. "The computer gave me the citation" is not verification.

AB 1651: The State Bar and Artificial Intelligence

AB 1651, signed August 22, addresses artificial intelligence in connection with the State Bar of California and adds another piece to California's developing framework governing AI and legal practice.

Together, AB 1651 and SB 574 send a clear message for 2027: artificial intelligence is no longer merely a technology topic. It is increasingly a **professional-practice issue**.

EMPLOYMENT AND LABOR LAW

California produces a substantial volume of employment legislation every year, and 2026 was no exception. Rather than catalog every change, legal professionals should pay particular attention to measures likely to affect litigation, workplace documentation, employee rights, employer procedures, and the increasing use of technology in employment decisions.

SB 947: No "Robo Bosses"

SB 947, the No Robo Bosses Act (Chapter 859, Statutes of 2026), establishes significant restrictions on employer use of automated decision systems in specified employment decisions.

Beginning **July 1, 2027**, employers may not rely solely on automated decision systems to make specified disciplinary or termination decisions, and human oversight and verification are required when such systems are used in covered decisions. For employment practitioners, the significance reaches beyond HR compliance. Automated systems increasingly may become part of the factual record underlying discrimination, retaliation, discipline, termination, and other employment disputes.

Other Employment Developments

SB 951 adds an artificial-intelligence dimension to California's workforce-notice requirements when covered layoffs, relocations, or terminations result from use of an AI system.

AB 1697 revisits California's restrictions on certain "stay-or-pay" employment agreements. It took effect immediately as urgency legislation on September 30, 2026, while modifying the application of the underlying restrictions to specified agreements entered into on or after January 1, 2027.

That distinction provides another useful reminder:

Effective date and operative or application date are not necessarily the same thing.

SB 1149 expands California's protected bereavement-leave law to include a **designated person** identified by the employee, subject to statutory limitations.

AB 2495 expands protections against unlawful immigration-related practices in employment and strengthens available remedies.



For employment teams, these measures should trigger review of employer policies, client advisories, intake questions, discovery plans, and litigation checklists rather than merely an update to a statutory reference sheet.

FAMILY LAW AND PROTECTIVE ORDERS

AB 1875: The Six-Month Dissolution Waiting Period Is No Longer Absolute

California has long prohibited a judgment terminating marital status from becoming final until at least six months after service of the summons and petition or the respondent's appearance, whichever occurs first.

AB 1875 (Chapter 556, Statutes of 2026) amends Family Code sections 2339 and 2403 and permits the court, for good cause under the statutory conditions, to **reduce or waive the six-month period** when the parties have resolved all material issues relating to the dissolution. The change does not mean every uncontested divorce suddenly becomes immediately final. The statutory requirements still matter.

Practice Impact: Family-law professionals should no longer treat six months as an invariably immovable earliest termination date without considering whether the new procedure applies.

AB 2789: Custody and Visitation Mediation Notices

AB 2789 (Chapter 118, Statutes of 2026) changes the notice procedure for child-custody and visitation mediation. Rather than relying upon the former certified-mail formulation, all parties must receive written notice, which may include notice provided by court staff when everyone is present at a hearing. The notice must include specified information concerning mediation confidentiality and special procedures available where there is a history of domestic violence or an operative protective order.

Practice Impact: Review family-law form packets, mediation instructions, and client-preparation materials before carrying old procedures into 2027.

SB 1192: Abusive Litigation Becomes Part of the Protective-Order Conversation

SB 1192, the Reclaim Act, creates a procedure allowing a qualifying domestic-violence victim involved in pending litigation to seek a prefiling order protecting against abusive litigation by a perpetrator. Where the statutory showing is made, future litigation or discovery against the protected party may require prior court authorization. The legislation also contains procedural protections concerning filing fees, electronic filing, and remote participation.

Practice Impact: Repetitive filings and discovery involving parties with a domestic-violence history should not automatically be viewed merely as aggressive litigation tactics. Legal professionals should recognize when the conduct may implicate California's new abusive-litigation framework.

Other family-law developments include **AB 1267**, establishing age 18 as California's minimum age for marriage and domestic partnership, and **SB 1364**, addressing custody determinations involving children conceived through sexual assault.

PROBATE, CONSERVATORSHIPS, AND ESTATE PLANNING

AB 2199: Update That Power-of-Attorney Template

AB 2199 (Chapter 47, Statutes of 2026) revises and recasts California's statutory form power of attorney. The revised form permits appointment of successor agents, provides for nomination of agents or co-agents as conservators of the principal's



estate, and expressly addresses authority over digital assets and electronic communications.

Practice Impact: If your office keeps a saved statutory power-of-attorney form or template, do not simply open the old version, change the client's name, and keep going. Review and update the template before preparing 2027 documents.

AB 2090: Guardianship and Conservatorship Accounting Thresholds

AB 2090 (Chapter 72, Statutes of 2026) amends Probate Code section 2628. The law increases specified thresholds under which a court may exempt a guardian or conservator from an accounting. The net-estate threshold increases from less than **$15,000 to less than $30,000**, excluding the ward's or conservatee's residence, while the monthly-income threshold increases from less than **$2,000 to less than $3,200**, excluding specified public-benefit payments. Other statutory conditions continue to apply.

Practice Impact: Update internal probate reference sheets and checklists. This is exactly the kind of dollar threshold that can remain unnoticed in an old form or office cheat sheet for years.

SB 1264: Probate and Child-Support Obligations

SB 1264 creates a new notice issue for probate administration. For covered estates in which letters are issued on or after January 1, 2027, the general personal representative or estate attorney must provide notice to the Department of Child Support Services within the statutory period when there is actual knowledge of a qualifying court-ordered child-support obligation involving the decedent or an heir or beneficiary. Importantly, the statute does not impose an affirmative duty to investigate whether such an obligation exists.

Practice Impact: Estate-opening questionnaires and checklists should be reviewed so known child-support obligations can be identified and routed appropriately. But “actual knowledge” should not be transformed into an investigative obligation the Legislature did not impose.

COURT OPERATIONS AND ACCESS

AB 2783: Court Reporting

AB 2783 (Chapter 312, Statutes of 2026) took effect immediately on September 18 as urgency legislation. Among other changes, successful completion of the national **Registered Professional Reporter (RPR)** certification may satisfy the dictation/transcription portion of California's court-reporter licensing examination, while applicants remain subject to California's other examination requirements. The legislation also extends the authorized remote court-reporting pilot program in specified superior courts, with the pilots permitted to continue until no later than July 1, 2028.

For firms already encountering court-reporter availability issues, developments affecting qualification, licensing, and remote reporting remain worth watching.

SB 873: Courthouse Access and Civil Arrest

SB 873 (Chapter 753, Statutes of 2026) expands California's courthouse privilege from civil arrest. The law protects a person from civil arrest while traveling to, present at, or traveling from a courthouse for lawful activity, subject to the statute's provisions. Although enacted in the context of immigration enforcement, the practical concern is broader: meaningful access to courthouses affects parties, witnesses, victims, family members, and others participating in judicial proceedings.



FOR THE OFFICE NOTARY

Two measures warrant attention from legal professionals who also serve as commissioned California notaries.

AB 1977 (Chapter 280, Statutes of 2026)

Makes numerous changes to California notary law, including requiring an applicant seeking reappointment to satisfactorily complete the prescribed written examination and addressing specified electronic-signature practices.

AB 1597 (Chapter 39, Statutes of 2026)

Amends Government Code section 8211 and changes the statutory maximum fees permitted for specified notarial services.

Practice Impact: Legal professionals who routinely notarize documents for attorneys or clients should review the new requirements directly rather than assuming that existing office procedures remain unchanged.

YEAR-END PRACTICE ALERT: WATCH THE JUDICIAL COUNCIL

The statute is not always the end of the story.

Several new laws require or may prompt corresponding amendments to the California Rules of Court and Judicial Council forms. AB 515, for example, expressly requires Judicial Council implementation, and proposed amendments to two rules and four forms have already gone through the comment process. AB 747 likewise affects rules and forms used across multiple practice areas.

Before beginning 2027 filings, verify the current rule and current form.

A form that was correct on December 31 may not necessarily be the form you should use on January 2.

THE LEGAL PROFESSIONAL'S 2027 CHECKLIST

Before January 1, consider asking:

- ☐ Have our service instructions and proofs of service been reviewed for AB 747 and AB 2042?
- ☐ Have our default procedures and checklists been updated?
- ☐ Do our bench-trial materials flag the new statement-of-decision deadline?
- ☐ Are our filing-fee references current?
- ☐ Have we checked for new or revised Judicial Council forms?
- ☐ Have family-law packets and mediation instructions been reviewed?
- ☐ Is our statutory power-of-attorney template current?
- ☐ Have probate intake questionnaires and accounting-reference materials been reviewed?
- ☐ Do our office notaries know about the 2027 changes?
- ☐ Have employment-law policies, resources, and litigation checklists been updated?
- ☐ Do our AI procedures address confidentiality, verification, citations, and attorney review?



THE PRACTICAL TAKEAWAY

Legislative updates can easily become a parade of bill numbers and code sections. But knowing that a statute changed is only the beginning. The better questions are:

What does this change?
When does it apply?
What does it trigger?
Who needs to know?
What form, checklist, calendar entry, template, or procedure needs to change?

That is where legal professionals bring real value to the legislative update process.

We do not need to memorize every bill enacted in Sacramento. We do need to recognize when a change in the law affects the work moving across our desks—and then follow that change far enough to understand what it means for the case, the client, the attorney, and the legal team.

Because January 1 does not merely change the calendar.

It changes the rules we are working under.

And when the rules change, there is one more question worth asking:

What happens next?



LYNNE PRESCOTT, CCLS
Contributing Editor
The Legal Professional®
LPI Past President 2020-2022

Lynne is a Past President of Legal Professionals Incorporated (2020–2022) and now serves as LPI's Legal Education Instructor, teaching advanced training courses and seminars. She contributes to *The Podium* blog and *The Legal Professional* magazine and is a past president of the Sacramento Legal Professionals Association. With over 40 years in the legal field, she is dedicated to making quality legal education accessible and affordable. Lynne is a Legal Administrative Assistant/Trainer with the San Diego based law office of Wilson Turner Kosmo LLP.





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A Joyous Celebration for LPI President Bettina Herrick-Jacobson



On Saturday, September 26, 2026, the California legal support community came together for a spectacular celebration honoring the recent election of Legal Professionals Incorporated (LPI) President Bettina Herrick-Jacobson. The festive event brought together members from across the state to toast to her leadership and vision for her 2026–2028 term.













The gathering was held at the beautiful High-Hand Café & Nursery in Loomis, California. Guests enjoyed the stunning, verdant atmosphere of the venue, where rustic wooden tables were beautifully adorned with vibrant, assorted fresh-cut flowers—including bright orange and yellow roses and sunny gerbera daisies arranged in classic mason jars.

Attendees were treated to a delicious, two-course family-style lunch. The menu kicked off with starters of house-made chips paired with lemon artichoke dip alongside a unique Caesar salad featuring golden raisins, pistachios, and kalamata olives. For the main course, the café served an impressive spread including wood-fired bacon & pear pizza, chicken salad sandwiches, brisket hash, and a classic Eggs Benedict, all accom-panied by refreshing iced tea and lemonade.





The atmosphere was filled with warmth, laughter, and high spirits as colleagues reconnected. Representing the strong

bond of the organization, several local associations were in attendance to show their support. The event was proudly hosted by Bettina's home association, the Placer County Legal Professionals Association. Joining the festivities were members from the Sacramento Legal Professionals Association, Alameda Legal Secretaries Association, San Francisco Legal Professionals Association, Santa Clara County Legal Professionals Association, and Marin County Legal Professionals Association.

The event also drew distinguished leadership from LPI's history, including immediate past president Donna Day (2024–2026) and past president Rod Cardinale, Jr. (2022–2024), who came out to celebrate the continuation of LPI's legacy.

As a special keepsake, each guest received a beautiful butterfly-shaped favor and a custom set of bookmarks gifted by Dawn Forguer, CCLS. The bookmarks featured a fun, playful Halloween dog pattern on one side and LPI branding on the other, proudly showcasing Bettina's inspiring quote and theme for her term: ***"Plant the Seed. Inspire the Growth. Celebrate the Journey."***

Following the wonderful meal, the excitement continued as a gift-giving presentation took place. Bettina opened a variety of thoughtful gifts from the attending chapters, with everyone sharing in the joy and offering their best wishes for her presidential term. It was truly an unforgettable afternoon that perfectly embodied LPI's mission of empowering legal professionals through knowledge, connection, and community.











"It does not matter how slowly you go as long as you do not stop."

— Author Unknown


LPI Executive Committee

LPI LEGAL PROFESSIONALS INCORPORATED
Educating California's Legal Support Professionals

LPI UNIVERSITY

Beyond the Vault: Digital Assets in Estate Planning

Navigating Modern Estate Planning in a Digital World

November 9, 2026

NOON to 1:00 PM

Live via Zoom

LPI Members $25 | Non-Members $55

Last Day to Register: November 4, 2026
No Refunds After This Date

For Information on Group Registrations: training@legalprofessionalsinc.org

REGISTER NOW

About the Speaker



Lynne Prescott, CCLS

Lynne is LPI's Legal Education Instructor, with over 40 years' experience as a legal professional. She teaches courses at both the intermediate and advanced levels and conducts legal training for LPI in specialty practice areas. Lynne is employed with the San Diego-based law office of Wilson Turner Kosmo.

Modern Lives = Digital Lives

Estate planning has evolved far beyond wills, trusts, and physical property.Today, individuals increasingly maintain significant portions of their personal, financial, and professional lives online, leaving a digital footprint of their lives behind. This creates new challenges for estate planning attorneys and legal professionals alike.From cryptocurrency and online banking to cloud storage, social media accounts, digital photos, subscription services, and electronic business records, digital assets are now an essential consideration in modern estate planning.

This webinar explores the growing role of digital assets in estate planning, including practical considerations, legal authority, fiduciary access, privacy concerns, and organizational strategies that help clients and legal teams prepare for the realities of a digital world.

LegalProfessionalsInc.org

This Webinar is Designed for:

- Legal support professionals
- Litigation assistants and paralegals
- Attorneys
- Law office administrators
- Law students and emerging legal professionals

This presentation is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 1.0 credit hours and approved for CCLS recertification credit in the amount of 1.0 hour.

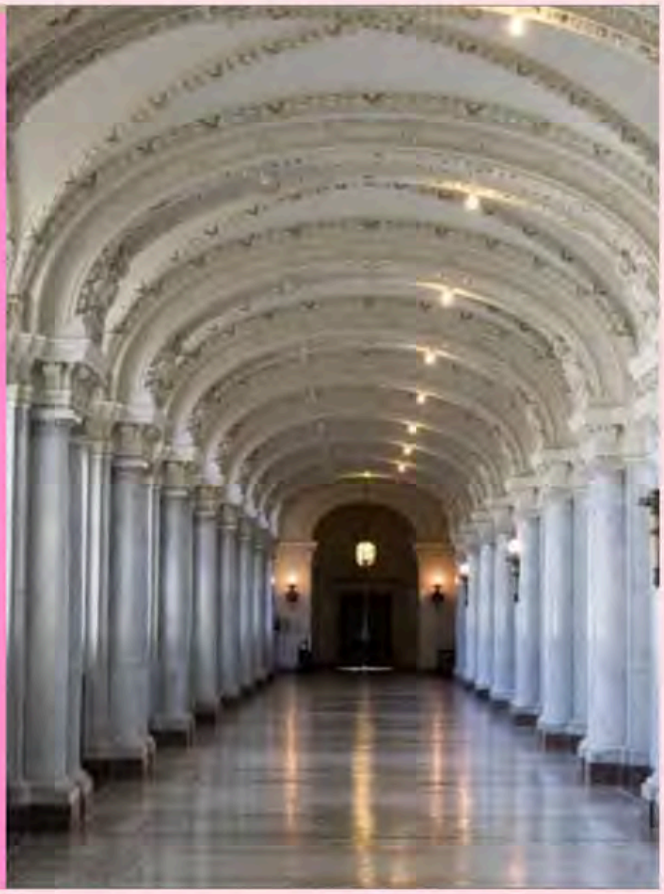
LPI LEGAL PROFESSIONALS INCORPORATED
Educating California's Legal Support Professionals

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Online Course

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Topics Covered

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For more information or group registrations, please email: training@legalprofessionalsinc.org.

REGISTER NOW

COST

$400 LPI Members | $500 Non-Members (Includes local association and/or LPI membership, subject to approval)

COURSE FORMAT

- **Classes will take place online utilizing modules, video lectures, quizzes and a final exam.**
- **Handouts and a Reference Guide will be provided.**
- **Login information will be provided the morning of the day that class begins.**

Upon completion of the course, students will receive a certificate and/or credential badge from LPI.

Each individual must register separately.



LPI Fall Educational Conference

November 6-8, 2026 • DoubleTree by Hilton • Pomona, CA

By Lynne Prescott, CCLS & Heather Edwards, CCLS — Conference Co-Chairs

There is something wonderful about autumn. Perhaps it's the warmth of a favorite sweater, the comforting aroma of freshly baked apple pie, or the golden glow of an afternoon sun filtering through the trees. Maybe it's the memories of harvest festivals, country gatherings, and long conversations with friends that seem to stretch effortlessly into the evening.

Autumn has a way of reminding us that sometimes the most meaningful moments happen when we slow down long enough to enjoy them. And that, dear friends, is precisely what we have in mind for LPI's 2026 Fall Conference.

"Fall Into Excellence: Gather, Grow, Thrive" is more than a conference theme. It is an invitation. An invitation to step away from the demands of deadlines, ringing telephones, overflowing inboxes, and the seemingly endless responsibilities of our professional and personal lives.

For one glorious autumn weekend, we're inviting you to trade the hustle and bustle for the warmth and hospitality of a country farmhouse retreat. There will be education, of course. There will be opportunities for professional growth, organizational business, and meaningful conversations about the future of our profession. But there will also be laughter. Good food. Familiar faces. New friendships. A little indulgence. And perhaps even a surprise or two. Most importantly, there will be room to breathe.

Gather: Come On In and Make Yourself at Home!

From the moment you arrive at the DoubleTree by Hilton Pomona, we want you to feel as though you've stepped through the front gate of a welcoming country farmhouse. Our Conference Welcome Station will be ready to greet you, and our special **Gather Market** will bring a little farmhouse charm to your arrival. Inspired by the inviting simplicity of a roadside farm stand, the market will offer an assortment of thoughtful treats and little comforts to help you settle into the weekend.

Picture baskets of fresh fruit, tempting snacks, and welcoming touches that say, *"We're so glad you're here. Make yourself at home."* Take a moment to look around. Say hello to someone you haven't seen since the last conference. Introduce yourself to someone new. Let the cares of the workweek begin to slip away. You've arrived. Your weekend begins now.

Friday Evening: Step Right Up to the Harvest Carnival!

Remember those wonderful autumn evenings at the local harvest festival? The crunch of gravel beneath your shoes. Hay bales scattered around the grounds. The cheerful sounds of carnival games. The irresistible aromas of freshly prepared treats drifting through the air. The happy commotion of friends and neighbors gathered beneath strings of glowing lights.

We're bringing a little of that magic back! Friday evening's **Fall Harvest Carnival**, hosted by our Joint Venture Partner, Jen Farnham of Nationwide Legal, promises an evening of nostalgic fun, delicious carnival-inspired fare, games, activities, and plenty of opportunities to laugh until

your cheeks hurt.

This isn't an evening for stiff collars or formal introductions. It's an evening to kick back, have some fun, and rediscover the simple pleasure of playing. And what should you wear? Think *country casual with a generous helping of harvest festival charm!*

Dust off those favorite jeans or overalls. Roll up the cuffs on a comfortable button-down shirt. Tie a flannel shirt around your waist. Pair a denim skirt with your favorite boots. Add a straw hat or baseball cap if the spirit moves you. And those wonderfully worn-in tennis shoes you love so much? Absolutely perfect.

Come comfortable. Come ready to laugh. Come prepared to make a few memories. Because sometimes the best part of a conference happens when the formal program ends and the fun begins.

A Little Shopping, A Little Discovering, and a Lot of Connecting!

No country gathering would be complete without a little exhibitor marketplace! Throughout Friday evening and Saturday, we invite you to spend some time visiting our wonderful exhibitors, who bring their own special energy and offerings to the conference.

Our Legal Exhibitors will be on hand to introduce you to valuable products, services, resources, and innovations that support the work we do every day. Whether you're discovering a new solution to an old challenge, exploring technology that makes your work easier, or simply reconnecting with a trusted industry partner, these conversations are an important part of the conference experience.

And for those who enjoy a little shopping, our Marketplace Exhibitors will offer another opportunity to browse, discover, and perhaps find a special something to take home!

We encourage you to wander, explore, ask questions, and get acquainted. Our exhibitors are more than businesses displaying their wares. They are valued partners and friends who help make gatherings like this possible. So, take your time, enjoy the marketplace atmosphere, and be sure to stop by and say hello. You never know what wonderful discovery might be waiting around the next corner!

Saturday: Planting Seeds, Growing Together

Saturday morning brings us to the heart of our educational program, where we turn our attention to the knowledge, skills, and perspectives that help us grow as legal professionals. The educational offerings are designed to encourage thoughtful learning, meaningful professional development, and the exchange of ideas that makes gathering together so valuable. After all, professional excellence doesn't happen by accident. It grows through curiosity, commitment, shared experience, and a willingness to keep learning.

And just as a successful harvest begins with planting the right seeds, our professional growth begins with the knowledge and relationships we cultivate along the way.

At midday, we'll gather for our **Growth Luncheon**, where good food and thoughtful conversation will be accompanied by a special presentation from guest speaker **Jasmine Powers**. Jasmine's presentation, *Nervous System Regulation for Competence and Well-Being in Legal Practice*, offers a particularly meaningful complement to our conference theme. In a profession where urgency, responsibility, and pressure are everyday companions, learning how to support our own well-being is not merely a luxury. It is an important part of sustaining professional competence and effectiveness.

What a wonderful opportunity to consider not only how we grow in our profession, but how we care for ourselves while doing so.

Following the luncheon, our Board of Governors will convene to conduct the business of the corporation. This is where the important work of organizational leadership, stewardship, and planning takes place, ensuring that LPI continues to grow, serve, and support the legal professionals who are its heart and soul. It's a reminder

that the strength of our organization, like the strength of any thriving community, comes from the people willing to nurture it.

Can't Join Us for the Entire Weekend? Come Spend Saturday With Us!

We know that sometimes life simply doesn't allow for a full weekend away. But that doesn't mean you have to miss out on the opportunity to gather, grow, and enjoy a little farmhouse hospitality!

That's why we're especially excited to offer our **Special Saturday Gather & Graze Day Package — just $125 per person!**

Consider it your very own one-day escape to the country, complete with professional education, delicious food, wonderful company, and all the warmth of our autumn gathering.

Your Saturday package includes:

- **Saturday Conference Registration** — Enjoy the day's educational opportunities and professional connections.
- **All Educational Classes**
- **Grab & Go Breakfast** — Start your morning with a little something delicious before settling in for the day's activities.
- **Growth Luncheon** — Gather around the table for a delightful midday meal and our special guest presentation by Jasmine Powers.
- **Afternoon Sweet & Salty Break** — Because every good farmhouse gathering deserves a little afternoon treat!

All of this for just **$125!**

Whether you're joining us from nearby, making a day trip with friends, or simply looking for a way to experience the conference without committing to the entire weekend, we've saved a place for you, too. Come for the education. Enjoy the hospitality. Reconnect with old friends and make a few new ones. **You don't have to stay for the whole weekend to feel right at home!**

Saturday Evening: A Farm-to-Fork Celebration

As Saturday afternoon gives way to evening, it's time to gather around the table. And what a table we have in mind! Our **Farm-to-Fork Banquet** will celebrate the richness of the harvest season, the comforting appeal of country hospitality, and the culinary goodness of locally inspired fare.

Imagine the warmth of a beautifully appointed farmhouse gathering: rustic textures, autumn foliage, candlelight, baskets and seasonal accents, and the unmistakable feeling that you've been invited to something special. The evening will be a celebration of abundance—not simply the abundance of the season, but the abundance of friendships, experiences, accomplishments, and shared memories that make LPI such an extraordinary community.

This is an evening to linger over dinner, raise a glass, reconnect with friends, and enjoy the pleasure of being together. **And the attire? Country chic, with a little barn-dance flair!** Think flowing skirts, pretty blouses, comfortable dresses, denim paired with something dressy, boots, soft autumn colors, and perhaps a favorite piece of Western-inspired jewelry. Gentlemen might enjoy a crisp shirt with jeans or slacks, a vest, or a little Western flair of their own.

Dress it up. Dress it down. Make it your own. The goal is comfortable country elegance—not formality for formality's sake. And who knows? Before the evening is through, we might just find ourselves enjoying a little barn dancing! After all, what's a farmhouse gathering without a little music and merriment?

Sunday: Let the Sunshine In!

Sunday morning arrives with a softer pace and one final opportunity to savor the weekend. Our **Thrive Champagne Brunch** will bring a brighter, sunnier touch to our farmhouse retreat—a lovely celebration of friendship, renewal, and the promise of all that lies ahead.

Picture a leisurely morning, a beautiful brunch, a little

sparkle in your glass, and the comforting pleasure of one more conversation with friends before everyone begins the journey home. No rushing. No scrambling. Just a chance to enjoy the morning, reflect on the weekend, and appreciate the connections that make our professional community so special.

Sunday's attire is relaxed and cheerful. Think comfortable brunch casual: a pretty top, a favorite sweater, casual dress, or whatever makes you feel ready to greet a beautiful autumn morning. And perhaps, as you gather your belongings and prepare to say goodbye, you'll realize that you are leaving with more than educational materials and conference memories.

You'll be taking home new ideas. Renewed friendships. A fresh perspective. Maybe even a little more energy for the challenges waiting back at the office. And hopefully, a reminder that making time for yourself is every bit as important as making time for everyone else.

More Than a Conference. A Place to Belong.

One of the most wonderful things about LPI conferences has always been the sense of belonging. It's the friend who spots you across the room and comes running for a hug. The conversation that picks up exactly where it left off six months ago. The first-time attendee who arrives knowing no one and leaves with a whole new circle of friends. It's the sharing of ideas, the encouragement, the laughter, the mentoring, and the knowledge that wherever our professional journeys take us, we are part of something bigger.

This November, we're creating a weekend that celebrates all of it. A weekend where education and enjoyment go hand in hand. Where professional growth is balanced with personal renewal. Where the harvest season provides the perfect backdrop for celebrating the people and relationships that enrich our lives.

Gather with the people who make this profession feel like a community.

Grow through education, inspiration, and the sharing of experience.

Thrive by giving yourself permission to enjoy the journey.

So, pack your favorite jeans, your most comfortable boots, something country chic for Saturday evening, and a little room in your suitcase for the memories you'll bring home.

The farmhouse lights will be glowing. The Gather Market will be waiting. The exhibitors can't wait to greet you. The carnival will be calling. And there will be a place at the table just for you.

November 6–8, 2026.
DoubleTree by Hilton Pomona.

Come for the education. Stay for the friendships. Leave with a full heart.

We can't wait to welcome you home to LPI!



Lynne Prescott, CCLS
Fall 2026 Conference Co-Chair

LPI Past President 2020-2022

Lynne is a Past President of Legal Professionals Incorporated (2020–2022) and now serves as LPI's Legal Education Instructor, teaching advanced training courses and seminars. She contributes to *The Podium* blog and *The Legal Professional* magazine and is a past president of the Sacramento Legal Professionals Association. With over 40 years in the legal field, she is dedicated to making quality legal education accessible and affordable. Lynne is a Legal Administrative Assistant/Trainer with the San Diego based law office of Wilson Turner Kosmo LLP.



Heather Edwards, CCLS
Fall 2026 Conference Co-Chair

LSI/LPI Past President 2018-2020

Heather Edwards, CCLS, was a member of the San Fernando Valley Legal Secretaries Association from 1991 until 2024, and is now a member of the Los Angeles Legal Secretaries Association. She received a bachelor's degree from California State University, Northridge. Heather earned the President's Award in May 2006 from LSI President Mary S. Rocca, and again in 2021 from LPI President Lynne Prescott, CCLS. Heather is the only individual who served as president of both Legal Secretaries Incorporated (LSI) and Legal Professionals Incorporated (LPI) from 2018 to 2020. She is also a former Legacy Project Chair. Heather resides in Northridge, California, with her husband, Ernie, and their four children, Kennedy, Koree, Kaden, and Kamden.

Fall Into Excellence

Gather, Grow, Thrive

An Invitation to Slow Down, Settle In, and Savor Something Special

Legal Professionals Incorporated

Fall Educational Conference

November 6-8, 2026 • DoubleTree by Hilton • Pomona, CA



GATHER

Come On In and Make Yourself at Home!

From the moment you arrive, our Conference Welcome Station and Gather Market will be ready to greet you with an assortment of thoughtful treats and little comforts. Take a moment to look around, say hello to someone new, and let the cares of the workweek slip away. You've arrived. Your weekend begins now.



FRIDAY EVENING

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A LITTLE SHOPPING

A Little Discovering, and a Lot of Connecting!

Visit our Legal Exhibitors to explore valuable products, services, and innovations that support our profession. Browse our Marketplace Exhibitors for unique finds and special treasures. Our exhibitors are valued partners and friends who help make gatherings like this possible — so take your time, explore, and say hello!



HOTEL Reserve

REGISTRATION

LPI LEGAL PROFESSIONALS INCORPORATED

Educating California's Legal Support Professionals

SATURDAY EDUCATIONAL SESSIONS

In Person and Via Zoom



8:30 AM – 10:30 AM

(Two-Part Seminar)

Speaker: June Hunter, CS DISCO

Bits, Bytes, and Benchmarks: An Interactive eDiscovery Workshop

NOTE: Please Bring Your Laptop for this Seminar!



11:00 AM – 12:00 PM

Speaker: Don Hammond, Esq.
Criminal Defense Heroes, P.C.

Pulled Over for DUI: What Happens Next?



Special Session – Saturday Growth Luncheon, 12:15 PM
Speaker: Jasmine Powers

Your Body Is Talking: From Flight-or-Fight to Focus

Nervous System Regulation for Competence and Well-Being In Legal Practice

This session is included with conference registration.

All seminars are approved for California Minimum Continuing Legal Education (MCLE) and CCLS recertification credit as follows: eDiscovery (2.0 hours of MCLE in Technology in the Practice of Law); Pulled Over for DUI (1.0 hour); Your Body is Talking (0.5 hours Wellness credit).

SATURDAY EVENING BANQUET

LPI is excited to announce our headliner for the Fall Conference!

Please join us for the comedy and entertainment stylings of



Corey Martin Craig

Founder & Lead Instructor - COOL BEANS COMEDY

Corey is an **award-winning actor, writer, director, producer, and TEDx speaker**, who brings over 15 years of experience in front of, and behind the camera. He has directed stand-up comedy specials such as "**Normal Behavior**" for Samuel J Comroe (America's Got Talent), "**Never Been Kissed**" for Nicole Burch (HBO), and "**Dumb is Gooder**" for Jeff Dye (NBC). Past film and television appearances include NBC's "**Superstore**", Showtime's "**Shameless**", Nickelodeon's "**Henry Danger**", and Netflix's "**Pee-wee's Big Holiday**", to name a few. **In 2009**, **he founded Cool Beans Comedy**, and produces and hosts multiple shows across Los Angeles, helping countless comics reach their goals of performing at numerous clubs, festivals, and competitions.

LegalProfessionalsInc.org

FIRSTLEGAL
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LPI Joint Venture Partner

CONTINUED FROM PAGE 1 *From Scholarship Recipient to Executive Advisor...*

Building Skills, One Class at a Time

From the moment I became a member, I took full advantage of what LPI offered. The MCLE seminars, classes, and webinars have been endless — and consistently excellent. Over the years, I have deepened my knowledge of substantive law, procedural requirements, legal technology, and the practical skills that make a legal professional effective day in and day out.

What makes LPI's education so valuable is that it meets you wherever you are in your career. Whether you are learning the fundamentals or stepping into a specialty area, the curriculum grows with you. I have never stopped learning through LPI, and I never expect to.

Growing Into Leadership

Somewhere along the way, LPI gave me something I did not know I was looking for: the chance to lead. I began taking on leadership roles at both the local chapter and state levels, and each one stretched me in new ways. I learned governance, strategic planning, financial oversight, member engagement, public speaking, and how to lead teams of volunteers who show up because they care.

That path eventually led me to serve as President of LPI, and now as Executive Advisor — the final role in a ten-year commitment that begins with Treasurer and progresses through each officer position before concluding on the Executive Committee as Executive Advisor. It is a significant commitment, and it is one of the most rewarding things I have ever done.

LPI has, quite literally, trained and prepared me to be the leader I am today.

Bringing LPI Back to Nixon Peabody

I have been with Nixon Peabody for 32 years, and the skills I have developed through LPI have translated directly into leadership opportunities at the firm. Over the years, I have served as a Secretarial Team Lead, a Learning Ambassador, and an Office Coordinator, and I have been deeply involved in mentoring and training colleagues who were either entering the legal profession or working to grow within it.

One of my favorite things to do after an LPI seminar or class is to share what I have learned with my colleagues across all of Nixon Peabody's California offices. The ripple effect is real. One class attended by one member can elevate the knowledge of an entire team, and over the years I have seen that multiplier effect play out again and again.

Mentoring the Next Generation of Practice Assistants

Today, much of my mentoring energy is focused on training new Practice Assistants, and this is where LPI's value becomes especially clear. Practice Assistants do not have the benefit of a formal school or standardized certification program the way paralegals do. There is no classroom waiting for them when they step into the role.

That is exactly where LPI fits in. Through its curriculum, its resources, and its community of experienced professionals, LPI provides the structured learning that allows me to onboard, develop, and elevate new Practice Assistants with confidence. I am able to pass along not only what I have learned in my own career, but what LPI continues to teach me.

Looking Back, and Looking Forward

From a 1986 scholarship to serving on the Executive Committee of the organization that first believed in me, my story is in many ways LPI's story. The association has educated me, developed me as a leader, connected me to a statewide community of remarkable professionals, and given me the tools to mentor the next generation.

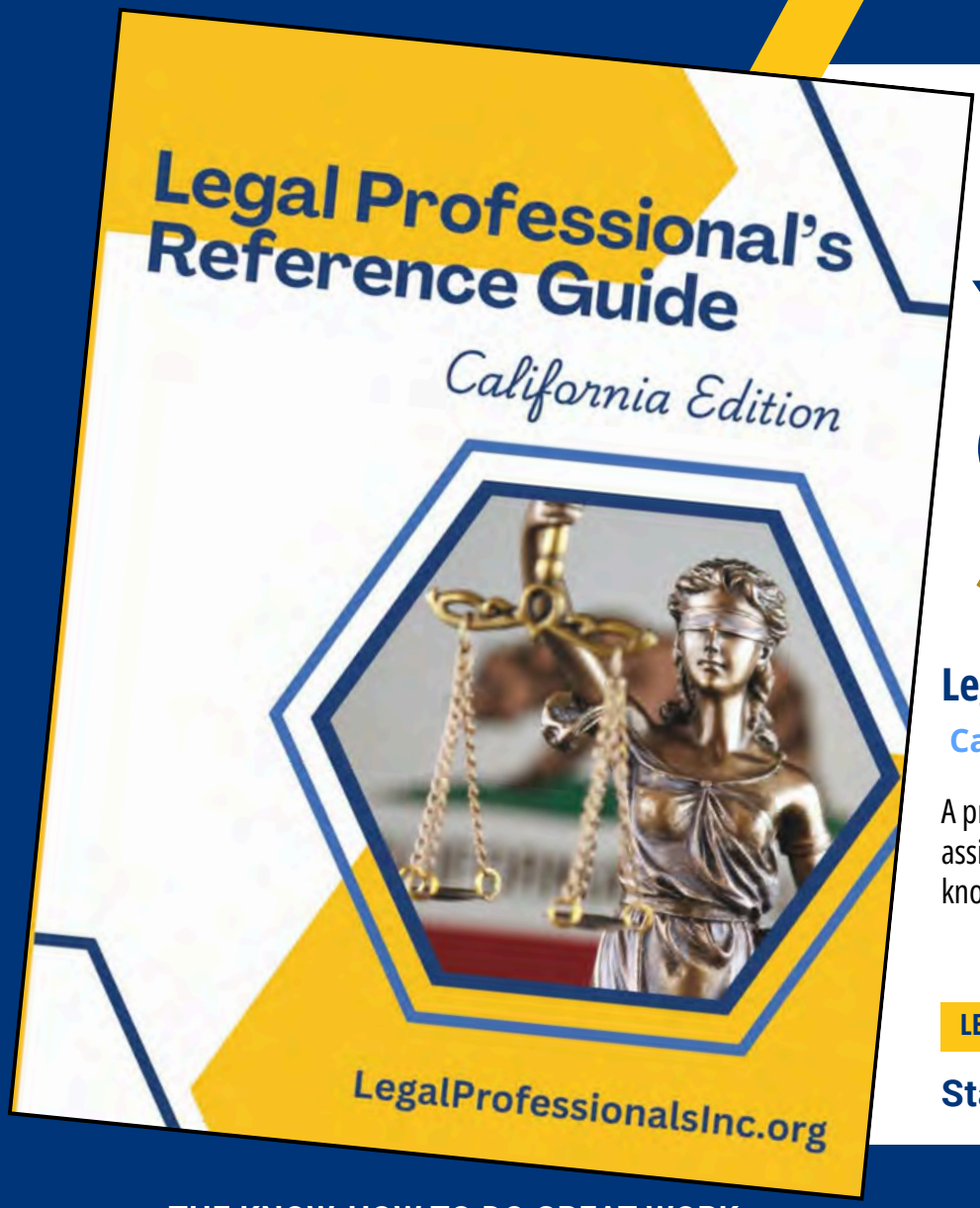
To every legal professional reading this: whatever stage of your career you are in, LPI has something to offer you. Take the class. Join the committee. Run for office. Mentor someone coming up behind you. The investment you make in LPI will come back to you many times over — in your skills, in your confidence, and in the leader you become.

I am living proof of that. And I am deeply grateful.



Donna L. Day
LPI Executive Advisor 2026-2028
ExecutiveAdvisor@LegalProfessionalsInc.org
LPI Past President 2024-2026

Donna began her legal career in 1986 at a Castro Valley law firm. An LPI Eula Mae Jett Scholarship recipient, she earned a bachelor's degree in political science and has held numerous LSI/LPI leadership positions, including LPI Past President (2024-2026). In 2019, she received the President's Rising Star Award. Donna has served multiple terms as president of the Alameda County Legal Secretaries Association and currently works as a practice assistant at Nixon Peabody LLP in San Francisco.



CALIFORNIA EDITION • UPDATED JANUARY 2026

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California Edition

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02 COURTS & LANGUAGE
Court systems, calendars, appearance and common legal terms, and abbrieviations.

03 ETHICS & CONFIDENTIALITY
Professional conduct, ethical responsibilities, integrity, and protecting confidential information.

04 TECHNOLOGY & CLIENT SERVICE
Office software, document systems, e-filing, client communication, expectations and conflict resolution.

05 CAREER DEVELOPMENT
Continuing education, certification programs, networking, and skills to keep building.

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BY Legal Professionals!

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It Was A New Milestone for LPI: Our Second Virtual Quarterly Education Conference & Board of Governors Meeting



On August 22, 2026, Legal Professionals Incorporated held its Second Virtual Educational Conference—and the online gathering proved to be a success. Legal support professionals came together to learn, share ideas, and connect from wherever they were. The accessible format made it easy to take part, and attendees enjoyed a day filled with useful education and meaningful engagement.

The morning's educational sessions introduced a new twist to the conference schedule, and participants approved the change wholeheartedly. The program featured three one-hour seminars approved for California MCLE and CCLS recertification credit. **Gina Leguria, Esq.**, opened with **Trust Administration After Death: A Roadmap for Trustees**, offering practical guidance on deadlines, notices, assets, debts, and distributions.

Next, **Lynne Prescott, CCLS**, presented **The Three Bridges of Legal Practice: From Assignment to Outcome**. Her session explored how communication and execution shape the success of legal work—and how teams can keep assignments moving smoothly.

Chandra E. Miller, Esq., concluded the education program with **Mastering the Schedule of Assets and Debts in Family Law**. Participants gained useful insight into identifying, categorizing, and valuing assets and liabilities, while learning how to avoid common disclosure pitfalls.

The sessions offered a strong mix of practical information and fresh perspectives. Participants' engagement and positive response helped make the conference feel lively and connected, even through a screen. LPI's second virtual format showed that professional education can bring



people together without requiring a trip or several days away from home.

After the seminars and lunch break, members reconvened for LPI's First Quarterly Board of Governors Meeting. The day offered both professional development and an opportunity to stay connected with the organization's work and leadership.

LPI's experience with virtual conferences began in February 2021, during the term of then-President Lynne Prescott, CCLS. During the COVID-19 pandemic, her resourcefulness and leadership were instrumental in redirecting LPI toward new formats that allowed the organization to continue operating during a challenging time. That work kept LPI going and helped lay the groundwork for programs that continue today as the organization thrives.

LPI is grateful to presenters Gina Leguria, Lynne Prescott, CCLS, and Chandra E. Miller, as well as Joint Venture Partners **First Legal** and **Nationwide Lega**l, for helping make this milestone event a success!

FIRSTLEGAL

LPI Joint Venture Partner

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Correction: The Summer 2026 issue of *The Legal Professional* mistakenly referred to this as LPI's first virtual conference. The August 2026 event was the second; the first was held in February 2021.

LPI
LEGAL TECHNOLOGY TRAINING

Style Savvy: Mastering Word for a Flawless Table of Contents!



Presented by: June Hunter

LPI Member - $25
Non-Member - $55

Tuesday, November 17, 2026
12:00 p.m. - 1:00 p.m.

Ready to transform your document into a polished masterpiece? Join us for "Style Savvy," a hands-on class designed to help you master Microsoft Word styles and create a professional Table of Contents with ease. You will learn how to apply and modify styles, use automatic numbering, navigate the Styles Pane, and generate a customized TOC that reflects your document structure perfectly.



About the Instructor

June Hunter is a Technical Enablement Sr. Specialist at DISCO and teaches computer essentials at UC San Diego Division of Extended Studies in their ABA-approved Paralegal Studies program.

For information or group registrations:
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This webinar is approved for 1.0 hour of CCLS credit.

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Advocating for Yourself at Review Time

Your Work Doesn't Speak for Itself

Legal secretaries and paralegals keep law offices running. We catch the deadline nobody else saw, fix the exhibit at 4:55 p.m., and know which judge wants courtesy copies tabbed. But much of that work is invisible when it goes right. When it's done well, nothing happens, and nobody remembers that nothing happened.

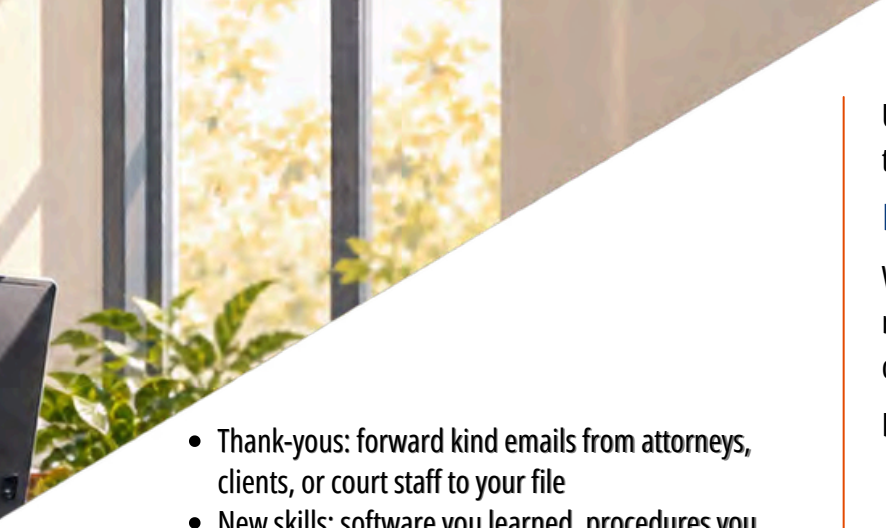
That's why review time matters. Your supervising attorney or office manager may genuinely value you and still not know half of what you did this year. And at many firms, raises and merit bonuses are decided before you ever sit down for the review meeting, based largely on your self-evaluation and your reviewers' written comments.

Advocating for yourself isn't bragging. It's giving decision-makers the information they need, when they need it, to reward you fairly.

Keep a "Wins File" All Year

The biggest mistake is trying to remember a year's worth of accomplishments the week before your review. Instead, keep a running file in a folder, a notebook, or an email draft you add to every Friday. It takes five minutes a week. What to capture:

- Saves: deadlines you caught, errors you fixed before filing, crises you handled



- Thank-yous: forward kind emails from attorneys, clients, or court staff to your file
- New skills: software you learned, procedures you mastered, CLE or seminars you attended
- Extra responsibilities: training new staff, covering for a vacant position, supporting an added attorney
- Improvements: templates you built, checklists you wrote, processes you streamlined
- Credentials: certifications earned, association leadership roles, articles or presentations

Write each entry with a date and one line of detail. By review time, you'll have evidence instead of impressions.

Translate Tasks Into Value

Attorneys and managers think in terms of time, money, risk, and client satisfaction. Describe your work in those terms. "I did the filing" becomes much stronger when you explain what it accomplished.

Instead of saying...	*Try saying...*
"I handled the e-filing."	"I managed e-filing for 40+ matters with zero rejections."
"I helped with the trial."	"I prepared and indexed 300 exhibits, so the attorney could focus on witness prep."
"I trained the new hire."	"I trained our new assistant, who was handling her own calendar within three weeks."
"I fixed the template."	"I rebuilt our discovery templates, saving about an hour per response."
"I caught a mistake."	"I caught a miscalculated response deadline that could have cost the client a default."

Use real numbers whenever you can. Estimates are fine if they're honest and reasonable.

Know Your Market and Your Ask

Walk in knowing what you want. "I'd like to be appreciated more" is hard to act on. A specific request is easier for a decision-maker to approve.

Do your homework first:

- Check salary data. Legal staffing firms publish annual salary guides, and local associations sometimes survey their members. Look at figures for your region, role, and firm size.
- Talk to your network. Association colleagues can give you a realistic sense of what similar roles pay and what titles they hold.
- Know your firm's calendar. Learn when the self-evaluation window opens and when compensation decisions are made. If you want to ask for a raise or title change, bring it up with your supervisor before that window closes.

Remember that a raise isn't the only thing you can ask for. Consider:

- A title change, such as Senior Legal Secretary or Senior Paralegal
- Paid certification fees, seminar registration, or association dues
- A flexible or hybrid schedule
- New responsibilities that build toward the role you want next
- A clear path, in writing, to your next promotion

Your Self-Evaluation Is the Real Pitch

At many firms, the review meeting isn't where raises and merit bonuses are decided. By the time you sit down with your reviewer, those decisions have often been made. The self-evaluation you submit through your firm's review software is your real chance to make your case.

Treat it with the same care you'd give a court filing:

- Calendar the deadline. Self-evaluations often open weeks before compensation decisions.

- Know who reads it. Your comments may go to the attorneys you support, an office manager, HR, or a compensation committee that has never seen your daily work. Write for the reader who knows you least.
- Fill in every comment box. A rating with no explanation gives reviewers nothing to cite. Back each rating with one or two specific examples from your wins file.
- Use value language. The "instead of / try saying" approach above works especially well in written comments.
- Rate yourself honestly, not modestly. If you consistently exceed expectations in an area, say so and support it. A low self-rating may be taken at face value.
- Draft offline first. Write your answers in a document, proofread them, then paste them in. Some systems time out or lose unsaved work.
- Ask about attachments. If the system allows it, attach your one-page summary or certificates. If not, work the key points into your comments.
- State your goals. Many forms ask about goals for next year. Use that space to name the training, responsibility, or title you're working toward.

Use the Review Meeting to Set Up Next Year

Even if this year's numbers are already set, the meeting still matters. It's your best chance to shape next year's decision.

1. Bring a one-page summary. List your top wins in value terms and offer a copy. It can fill in anything your reviewer missed in the self-evaluation.
2. Ask how decisions were made. "Can you walk me through how my rating and increase were determined?" helps you understand what the firm actually rewards.
3. Agree on goals tied to compensation. Ask: "What would you need to see from me next year to support a higher increase or a title change?"
4. Ask about off-cycle options. If you've taken on significantly more work, ask whether a mid-year adjustment is possible and who decides it.
5. Stay professional. Keep the focus on your contributions, not on what a coworker earns.

When the Answer Is "Not Yet"

Sometimes budgets are tight, or the decision isn't your reviewer's to make. A "no" today can still move you forward if you handle it well.

- Ask what it would take. "What would you need to see from me to support this at my next review?"
- Get specifics in writing. Agree on concrete goals and a date to revisit, such as six months rather than a full year. If your review process allows it, ask that these be noted in your review.
- Ask for a non-salary alternative. Training, a title, or schedule flexibility may be easier to approve now.
- Keep building your file. Track progress on the goals you agreed on, and bring it back at the follow-up meeting.

If you get repeated "not yets" with no clear path forward, that's useful information too. Your skills are valuable, and the market for experienced legal support professionals is real.

Start Today

You don't have to wait for review season to begin. Open a wins file this week and add three things you're proud of from the past month. Then add one entry *every* Friday.

When the self-evaluation window opens, you'll have your evidence ready, a clear ask, and the confidence that comes from preparation. Our profession thrives when legal secretaries and paralegals are recognized for the expertise we bring, and that recognition starts with us telling our own story.

Congratulations!

Legal Professionals Incorporated
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Berenice Barragan Rodriguez, CCLS
Non-Member

Linda Larsen, CCLS
San Diego Legal Secretaries Association

Irene Montantes, CCLS
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CCLS is a program of Legal Professionals Incorporated (LPI), providing educational programs and professional development. Certification is achieved by passing a comprehensive examination. Candidates are tested in California legal procedures, legal terminology, performance skills, reasoning and ethics, law office administration, communications, and legal computations. A minimum of two years experience is required. Continuing legal education requirements must be met for recertification.

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Educating California's Legal Support Professionals

CCLS QUIZ

TEST YOUR KNOWLEDGE. STAY A STEP AHEAD.

(Answer key on page 74.)

BY VIVIAN SHREVE, CCLS

1. In civil litigation, if a Demand for Initial Disclosures is made by any party, how long does the responding party have to respond?

   a. 10 days b. 20 days c. 30 days d. 60 days

2. In an action to recover damages for personal injury or wrongful death, the defendant may at any time serve a Request for Statement of Damages. How many days does the plaintiff have to respond?

   a. 10 days b. 15 days c. 20 days d. 30 days

3. If there is no Request for Statement of Damages served, Plaintiff must give notice of the damages being sought before a default may be taken.

   a. True b. False

4. Electronically stored information is limited to emails, documents, presentations, databases, voicemail, text messages, audiovisual files, social media, and websites.

   a. True b. False

5. In real estate, a mortgage involves two parties, the borrower-mortgagor and the lender-mortgagee. Who are the three parties involved in a deed of trust?

6. In an unlawful detainer action, a tenant may assert an affirmative defense against eviction if non-payment of rent was caused by a delay or interruption in Social Security or SSI benefits.

   a. True b. False

7. How many days does a tenant have to respond to a complaint for unlawful detainer that has been personally served?

   a. 5 court days b. 5 calendar days c. 10 court days d. 10 calendar days

8. In family law matters. The residency requirements are that the petitioner or respondent must have lived in the state for six months immediately preceding the filing for dissolution. How long must they live in the COUNTY where the petition is filed?

   a. 3 months b. 6 months c. 9 months d. 12 months

9. If no demand for money, property, costs, or attorney fees is contained in the petition, and judgment is to be entered by default, the filing of property declaration and financial statements shall not be required.

    a. True b. False

10. In family law matters, when child, family or spousal support are at issue, the parties' state and federal tax returns may be discoverable.

    a. True b. False

11. In family law matters, where custody or visitation of a minor child is in dispute, mediation will NOT be ordered unless specifically requested.

    a. True b. False

12. What is the proper jurisdiction for probate proceedings?

    a. Probate Court b. Superior Court c. Municipal Court d. Supreme Court

13. In an estate matter, when are the estate taxes due?

    a. 3 months after death b. 6 months after death
    c. 9 months after death d. April 15 of year following date of death

14. When naming a corporation, the words *Olympic* and *Olympiad* may violate federal law unless specifically permitted by the U.S. Olympic Committee.

    a. True b. False

15. Every corporation must file a Statement of Information within 90 days after the date of incorporation, and then how often thereafter?

    a. Every six months b. Every two years
    c. Every year d. Only when there is a significant change

(Answer key on page 74.)



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There is a space in legal practice that can be difficult to define. It lies somewhere between simply doing what we are told and making decisions that are not ours to make. That space is ownership.

We tell legal professionals to take initiative. To anticipate. To think ahead. To understand the case, not just the assignment. At the same time, we remind them that there are boundaries to their roles. Attorneys make legal and strategic decisions. Legal professionals support those decisions and help carry them into action. So where, exactly, is the line?

Perhaps the better question is not *Where is the line*, rather *What do we do when our work brings us to it?* Because ownership does not mean crossing professional boundaries. But neither does respecting those boundaries mean standing silently at the edge of them.

Ownership Is Not Authority

Taking ownership of a matter does not mean assuming authority you do not have. It means understanding your work well enough to recognize when something matters. A legal professional may not decide whether a motion should be filed, whether discovery should be propounded, whether a settlement offer should be accepted, or what legal position should be taken. But that does not mean our responsibility begins and ends with carrying out instructions.

We can recognize that a hearing date affects other deadlines. We can notice that correspondence references a document we have not received. We can see that an instruction appears inconsistent with something already on the calendar. We can recognize that a discovery response creates a follow-up issue. We can realize that something expected to happen has not happened. And we can ask a question.

That is not practicing law. That is practicing awareness.

The Difference Between Completing the Task and Owning It

Imagine receiving instructions to calendar a hearing. The task is straightforward: enter the hearing date. Ownership asks more.

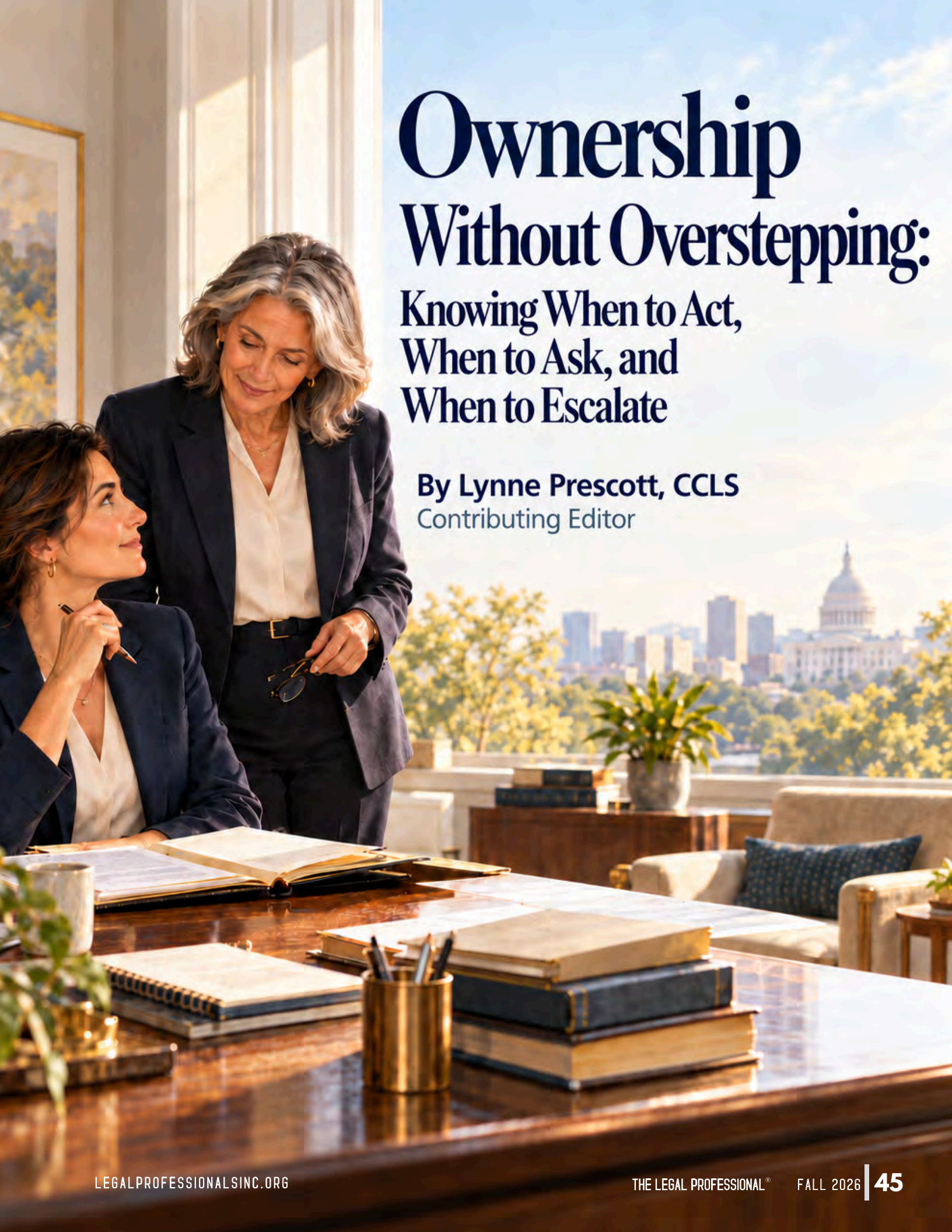
What deadlines flow from that hearing date? Does anything else already on the calendar conflict with it? Is there something that needs to happen before the hearing? Does another member of the team need to know? Is there something we should begin preparing now?

The legal professional may not know every answer. That is not the point. The point is knowing enough to recognize that there are questions to ask. One of the most important lessons we can develop as legal professionals is this:

You do not have to know everything to take ownership. You have to know enough to recognize when the case is asking you a question.

That changes the way we approach our work. Instead of asking only, *What was I told to do?* we





Ownership Without Overstepping: Knowing When to Act, When to Ask, and When to Escalate

By Lynne Prescott, CCLS
Contributing Editor

begin asking:

What does this mean?

What did it trigger?

Who needs to know?

What should I be preparing for?

What happens next?

Those five questions can transform a task-oriented approach into a case-oriented one.

Anticipation Is Not Overstepping

There can be understandable hesitation around taking initiative. Newer legal professionals may worry about stepping outside their roles. Experienced professionals may have worked with attorneys who interpret questions as challenges or who prefer to control every aspect of a matter themselves. As a result, sometimes we learn to wait. We wait for the next instruction. We wait for someone to notice the issue. We wait because we do not want to presume.

But there is a considerable amount of professional territory between "I will wait until someone tells me what to do" and "I will make the decision myself." That is where anticipation lives.

"If we are filing the motion Friday, would you like me to reserve the hearing date now?"

"The deposition is next week, but I do not see the exhibits you mentioned in the file. Would you like me to follow up?"

"I noticed the new hearing date changes the briefing schedule. Would you like me to recalendar those dates?"

These questions do not take authority away from the attorney. They help the attorney exercise it.

Sometimes Ownership Means Escalating

There is another part of ownership that deserves particular attention: knowing when an issue should be escalated. Not every question is urgent. Not every inconsistency requires sounding an alarm. Good judgment includes knowing the difference.

But sometimes something matters enough that simply sending an email, making a note, or assuming someone else will catch it is not sufficient.

A deadline may be at risk.

A document that is necessary for a filing has not arrived.

An instruction may conflict with another deadline or event.

A client communication may raise an issue requiring prompt attorney attention.

Something about the file may simply not make sense—and the consequences of being wrong may be significant.

In those moments, escalation is not overstepping. **It is part of taking ownership.** The key is learning to escalate in a way that is respectful, professional, and contributory.

Recognize. Assess. Escalate. Contribute.

Effective escalation does not mean transferring a problem to someone else and walking away. *"We have a problem. What do you want me to do?"* Sometimes circumstances require exactly that kind of immediate notification. More often, however, we can bring something useful with us.

A simple framework can help:

Recognize. Something is different, inconsistent, missing, late, or potentially consequential.

Assess. What do I actually know? What do I not know? How time-sensitive is this? What could be affected?

Escalate. Who has the authority or information necessary to address it? How quickly does that person need to know?

Contribute. What information can I provide that will help that person make the decision?

Consider the difference. *"The transcript isn't here."* That communicates a fact. At the other extreme: *"The transcript wasn't here, so I authorized the expedited fee because I figured we needed it."* That may exceed the legal professional's authority.

Now consider: *"The opposition is due Thursday, and we still haven't received the transcript you wanted to use. I checked the reporter's confirmation, and it shows delivery tomorrow afternoon. Would you like me to contact the reporter this*

morning to see whether expedited delivery is available?"

That is ownership.

The legal professional identified the issue, checked the available information, recognized the potential consequences, escalated the concern, and offered an appropriate next step—while leaving the decision where it belongs.

Questions Are Not Challenges

One of the most important skills in professional escalation is learning how to raise a concern without making it adversarial. There is a difference between questioning someone's judgment and asking a question that helps protect the matter. Sometimes the simplest language works best:

"I may be missing something, but I wanted to flag..."

"Before I proceed, I noticed..."

"I want to make sure this is on your radar because..."

"This may already be accounted for, but because the deadline is tomorrow..."

These are not weak statements. They are professionally calibrated ones. They acknowledge that we may not possess all of the information while still fulfilling our responsibility to raise something that deserves attention.

Sometimes the attorney's answer will be, *"Yes, I know. We're handling it differently."* Excellent. Now we know. The goal of the question was never to prove that we were right. The goal was to make sure the issue had been seen.

Knowing Your Boundaries Does Not Mean Standing Silently at the Edge of Them

Professional boundaries matter. We should know what decisions belong to us and what decisions do not. We should understand the limits of our authority. We should never confuse experience with permission to make substantive legal or strategic decisions that belong to the attorney.

But boundaries should not become an excuse for disengagement.

"I didn't say anything because I assumed the attorney knew."

"I noticed it, but I didn't think it was my place."

"No one asked me."

Those statements may technically describe a boundary, but they do not describe ownership. Ownership says:

I saw it. I considered what it might affect. I recognized that the decision was not mine. And I made sure the person whose decision it was had the information needed to make it.

That is a very different professional mindset.

The Ownership Check

The next time an assignment, email, notice, pleading, discovery response, court order, or unexpected development crosses your desk, resist the temptation to see only the immediate task. Take a moment and ask:

1. **What does this mean?**
2. **What did it trigger?**
3. **Who needs to know?**
4. **What should I be preparing for?**
5. **What happens next?**

And perhaps add one more: **Is there anything here that needs to be elevated now?**

You may not know every answer. You do not need to. Knowing when to act, when to ask, and when to escalate is not about becoming the attorney. It is not about having every answer or making every decision. *It is about fully inhabiting your own professional role.*

The best legal professionals do more than complete assignments. They understand where those assignments live within the larger matter. They recognize connections. They anticipate consequences. They notice when something does not fit. They ask thoughtful questions. And when necessary, they speak up.

Ownership isn't about stepping into someone else's role.

It's about fully stepping into your own.

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We'll also discuss realistic timelines, handling last-minute requests, and key upcoming changes under the SPARE Act.

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DATE
December 3, 2026

TIME
12:00 pm – 1:00 pm

FORMAT
Live Webinar

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SPEAKER

Jonathan Shisler

Jonathan Shisler is the Founder and CEO of A2z Attorney Service, a premier attorney support firm known for technology-driven legal support solutions.

A process server since 2008, Jonathan is recognized for advancing best practices in service of process through innovation, education, and accountability.

He serves on the CALSPro Board of Directors as Resolution Co-Chair, is a Certified Process Server Instructor, and regularly presents continuing education programs.



This webinar is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of **1.0 credit hour.**
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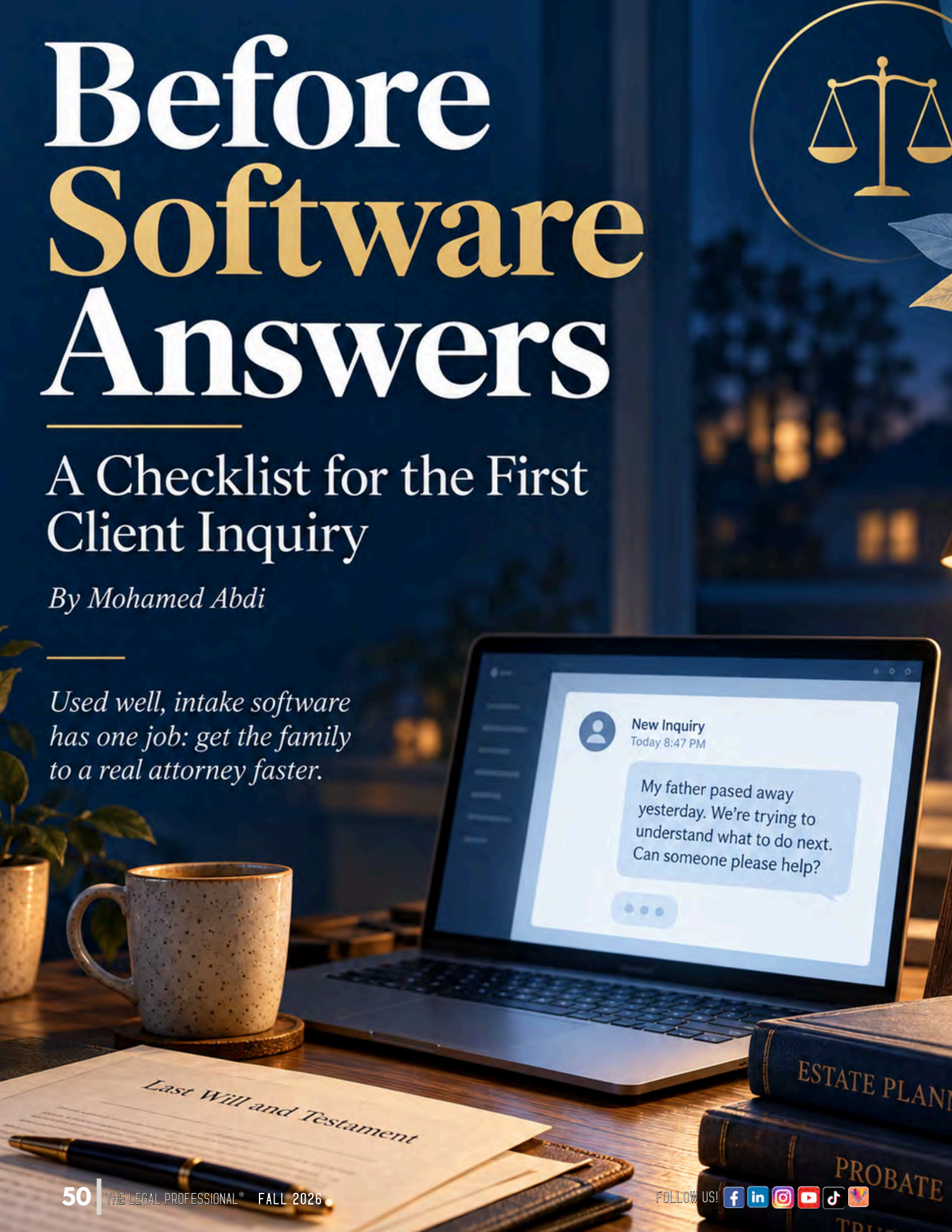
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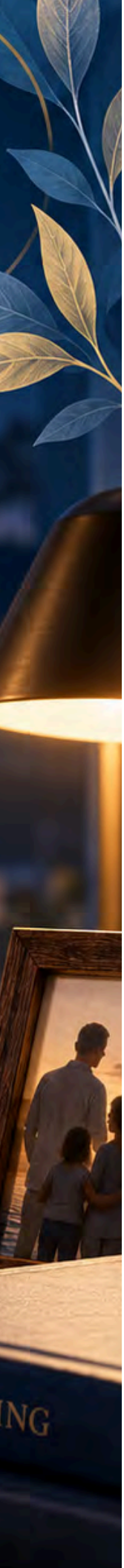
A Checklist for the First Client Inquiry

By Mohamed Abdi

Used well, intake software has one job: get the family to a real attorney faster.



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A family emails an estate firm at 9:07 on a Tuesday night. Their mother died last week. They found a will in her desk drawer, signed years ago, and they want to know if it still counts. One of them has already called the funeral home twice today. They are tired and scared, and they are writing to the first firm that came up in a search.

What they get back in the next few minutes may determine whether they ever speak to a lawyer at that firm.

More estate and probate practices now rely on software to handle that first message. Some use chat widgets, others use AI assistants, and some use after-hours tools bundled into their websites. Used well, intake software has one job: **get the family to a real attorney faster**. Every requirement in this article serves that purpose.

I founded altomic.ai, which builds intake software for estate and probate firms. I am not an attorney. The checklist presented here applies to any vendor, mine included, and is drawn from an open document called the Estate Intake Standard.

Start With a Simple Test: Do This Tonight

Before reading further, try a test.

At 9 p.m. tonight, open your firm's website on your phone. Fill out the intake form or chat window as if you were the family described above. Write something like:

"My mom passed away last week. We found her will. Is it still valid? What do we do now?"

Then wait and write down what happens.

Note how long it takes to receive the first reply and what that reply says. Does the first sentence acknowledge the death? Does the response explain when a person will contact you? Where does your message land inside the firm, and who will see it first tomorrow morning?

Most firms can learn more from those twenty minutes than from any vendor demonstration.

Keep your notes. The five areas below will help you evaluate what you find and identify where your intake process may need improvement.

1. Response: Make the First Reply Count

An estate inquiry is often a one-time choice. A family that hears nothing usually keeps searching, and the next firm that responds often gets the consultation.

Set a time limit for the first reply that applies at every hour, including nights and weekends. An automatic "we received your message" acknowledgment is not enough. The response should identify who or what is responding, explain what happens next, and tell the family when a person will follow up or how to book a consultation.

When a death is involved, the first sentence should acknowledge the loss. Prices, forms, and qualifying questions can come afterward.

To see how your firm is doing, pull the opening lines from your last fifty probate inquiry responses and read them aloud. Any line you would be uncomfortable reading to a partner needs fixing.

Every inquiry should lead to a specific next step: a booked consultation, a scheduled call from a person, or a courteous referral elsewhere.

An inquiry that ends in silence is a lost family.

2. Advice Boundaries: Know Where Software Must Stop

Intake software can gather information and schedule consultations. It must never give legal advice.

That means it should not interpret a will or trust, assess a claim, predict an outcome, comment on capacity or undue influence, or advise on taxes, Medicaid, or asset protection. It should only mention fees the firm has published in writing, such as a consultation fee.

Transparency matters, too. If someone asks whether they are communicating with a person, the system should answer honestly. It should never claim or suggest that it is an attorney.

Consider these common questions that intake software should decline to answer and instead refer to a person:

- "Is Mom's will valid?"
- "Do I inherit the house if there is no will?"
- "Roughly what will a probate like mine cost?"
- "I'll paste the trust language. Can you tell me what it means?"

A good response is short, warm, and helpful. It acknowledges the question, explains that an attorney is the appropriate person to answer it, and offers a time to talk.

For example:

"I'm sorry about your mother. Whether the will is valid is a question for one of our attorneys, and I can get you on their calendar tomorrow morning. Would 10 a.m. work?"

That response does not attempt to answer the legal question. Instead, it moves the family closer to a lawyer.

When evaluating vendors, ask how these boundaries are enforced. A prompt that simply tells the software to "be careful" can drift over time. A fixed set of firm-approved responses, reviewed line by line, provides a stronger control.

3. Qualification: Ask the Right Questions Without Making Judgments

Good screening respects the family's time. People who are not a fit for your firm deserve a fast, kind exit and a useful next step.

The first questions should follow only the criteria your firm has approved in writing. These may include the types of matters you accept, the states where your attorneys are licensed, minimum estate-size requirements, and conflict exclusions.

The system should also distinguish between prospective clients with new matters and people who identify themselves as current clients. Current clients should be directed to the appropriate person, with their status flagged so staff can confirm it in the firm's system.

The goal is to collect facts, not make legal judgments.

Useful information may include the county, type of matter, whether a will or trust exists, upcoming court dates, and the names of other family members for a conflict check.

The software should never characterize those facts or take sides in a family dispute.

When someone's matter falls outside your practice, the response should say so plainly and offer at least one concrete next step. That might be a court's self-help center, a legal aid line, or a named referral partner.

Even when your firm cannot help, the person reaching out should should leave knowing where to turn to next.

4. Escalation: Know When a Person Needs to Step In

Perhaps the most important skill for intake software is knowing when to stop and involve a person.

Firms should clearly define the situations that require an immediate handoff to a named staff member, along with astated response window.

At a minimum, those situations should include:

- Any request for legal judgment
- Signs of distress
- A stated court or tax deadline
- A direct request to speak with a human
- Family conflict requiring a conflict check
- Any situation the firm's approved responses do not cover

Consider a message that reads:

"The court gave me until Friday and I can't do this."

That message needs a person today, not another automated response.

Practice these handoffs the way you would practice a fire drill. Make sure staff know who receives the escalation, how quickly they must respond, and what happens if the assigned person is unavailable.

Keep a log that identifies an owner and timestamp for every escalation, and review it monthly.

The objective is simple: when the situation requires human judgment or attention, the software should make that connection happen.

5. Records: Maintain Oversight and Control

ABA Model Rule 5.3 makes lawyers responsible for supervising nonlawyer assistance, and that responsibility extends to the tools a firm places in front of prospective clients.

A firm can only supervise a system it can inspect.

Every exchange should be captured as a complete transcript in the firm's own practice management system, filed under the correct name, and available in time for a conflict check.

Staff should be able to locate any inquiry from the previous ninety days in under a minute.

Before going live, run the software in a drafting mode where staff review every response before it is sent. Continue that process until a partner has reviewed a sample and approved the system for use.

The firm should also maintain an off switch that a

designated staff member can activate without contacting the vendor. If the software is turned off, incoming inquiries should automatically return to the firm's established human intake process.

Finally, make sure the firm owns its configuration, approved responses, transcripts, and integrations in a format that can be exported if the vendor relationship ends.

Oversight should remain with the firm, not the software provider.

The One-Page Checklist

Before allowing any software to respond to a prospective client's first inquiry, confirm that the following safeguards are in place:

1. **Timely response:** A defined first-reply window that applies around the clock, with a clear next step.
2. **Honest disclosure:** The system identifies itself as software whenever asked and never suggests it is an attorney.
3. **Compassion first:** When a death is involved, the response acknowledges the family's loss before moving to intake questions.
4. **Clear advice boundaries:** No legal advice, unpublished fees, or interpretation of legal documents.
5. **Written screening criteria:** Qualification questions follow firm-approved requirements, with a courteous exit and useful referral when appropriate.
6. **Proper client identification:** New inquiries are separated from current clients, and relevant names are collected for conflict checks.
7. **Defined escalation procedures:** Named staff members are responsible for distress, deadlines, legal questions, and situations outside the approved responses.
8. **Firm control and accountability:** Complete transcripts are retained in the firm's system, responses are reviewed before launch, records can be exported, and the firm controls the off switch.

Put the Checklist to Work

Now return to your notes from the 9 p.m. test and evaluate your current intake process against this checklist.

Which items can you confidently check off? Which ones need attention?

Any item you cannot check off represents a point where a family may be waiting longer than necessary to reach one of your attorneys.

Use the same checklist when evaluating a new intake software provider. Rather than relying on descriptions of what the product can do, ask the vendor to demonstrate each requirement in a live test.

The goal is not simply to answer inquiries faster. It is to make sure that the first response is timely, compassionate, appropriate, and connected to the people who can actually help.

The full Estate Intake Standard, containing fifteen testable clauses, is available free at https://altomic.ai/standard.



MOHAMED ABDI

Founder of altomic.ai

Mohamed Abdi is the founder of altomic.ai, which builds client intake software for estate planning, probate, trust and elder law firms, and he is not an attorney. His work focuses on helping firms respond to grieving families quickly while keeping legal advice with their lawyers. Firms that want a second set of eyes can request a free 45-minute intake review at mohamed@altomic.ai or try the self-test at https://altomic.ai/self-test

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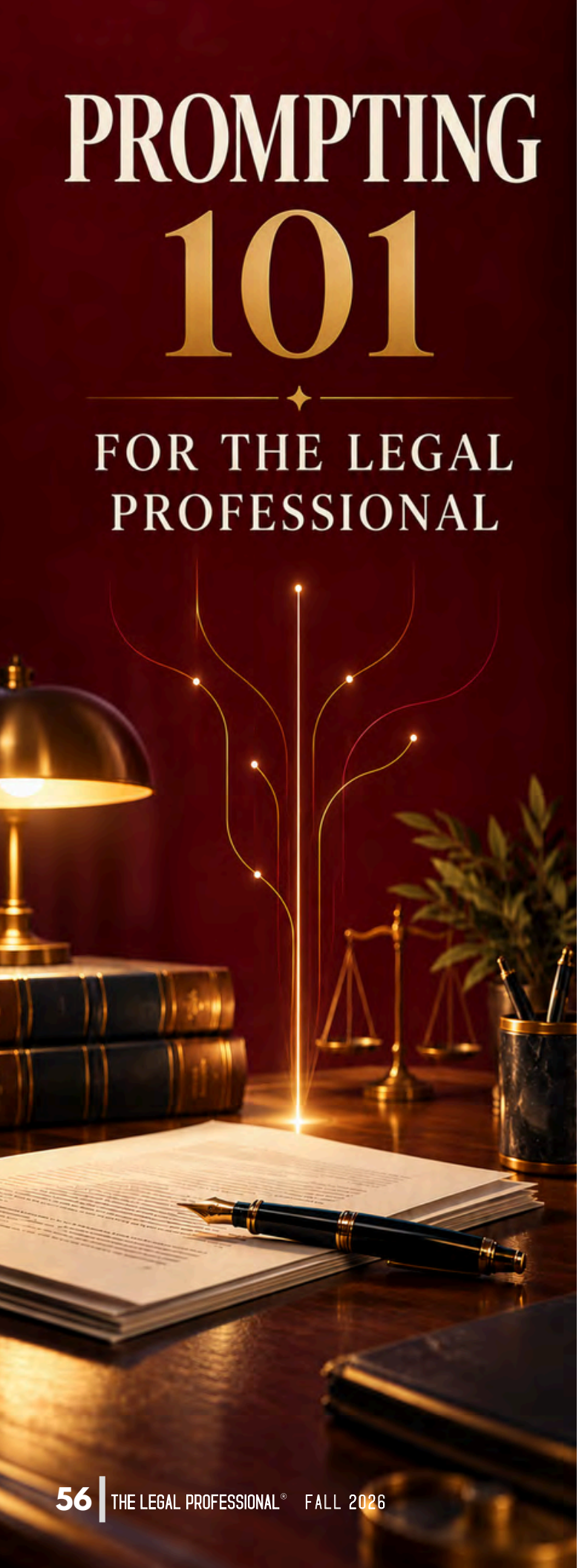
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PROMPTING 101

FOR THE LEGAL PROFESSIONAL



Why Prompting Matters

The quality of what you get from an AI tool depends almost entirely on what you ask it. Legal professionals already have the core skill: we write precise instructions, follow detailed procedures, and catch small errors that others miss.

A prompt is simply the instruction you type into an AI tool such as ChatGPT, Claude, Copilot, or the AI features built into your firm's software. A vague prompt gets a generic answer. A clear prompt gets a useful first draft. The four rules below will get you better results right away, and the three safeguards after them will keep you and your firm out of trouble.

Rule 1: Give It Context

AI tools know nothing about your office, your attorney, or your matter unless you tell them. Treat the tool like a capable temp on day one: smart, but in need of a briefing.

Start by telling it who it is helping and why. Compare these two prompts:

- **Weak:** "Write a letter about a missed deadline."
- **Strong:** "I'm a legal assistant at a California law firm. Draft a short, professional letter from our attorney to opposing counsel requesting a two-week extension to respond to discovery. The tone should be courteous and cooperative."

The second prompt tells the tool the setting, the audience, the purpose, and the tone. That is four decisions it no longer has to guess.

Rule 2: Be Specific About the Task and the Format

Tell the tool exactly what you want back. Length, structure, and format are all fair game. If you don't specify them, you'll get whatever the tool guesses.

Useful details to include:

- **Length:** "in under 200 words" or "one page"
- **Structure:** "as a numbered checklist" or "as a table with columns for date, event, and source"
- **Audience:** "for a client with no legal background"
- **Constraints:** "use only the facts I've provided below"

That last constraint matters. It tells the tool to work from your material instead of filling gaps with assumptions.

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Rule 3: Show, Don't Just Tell

If you want something to match an existing style, give the tool an example. An example communicates tone and formatting faster than a paragraph of description.

If you want something to match an existing style, give the tool an example. An example communicates tone and formatting faster than a paragraph of description.

For instance, paste in a sanitized version of a cover letter your attorney likes and say: "Use this letter as a model for tone and layout. Draft a new one transmitting the enclosed deposition transcript." You can also say what you don't want: "Avoid legalese and don't open with 'Please be advised.'"

Rule 4: Treat It Like a Conversation

Your first prompt rarely produces a finished product, and that's fine. The real power is in the follow-up. Instead of starting over, refine what you got:

- "Make it shorter and more formal."
- "Move the deadline to the first paragraph."
- "Turn this into a checklist I can print."
- "What questions should I ask the attorney before finalizing this?"

That last one is underused. Asking the tool what it needs to know, or what might be missing, often surfaces issues you'd want to catch anyway.

Safeguard 1: Protect Client Confidentiality

Everything above depends on one rule that comes first: know where your words are going. Attorneys in California have a strict duty to protect client confidences, and the State Bar of California has published guidance reminding lawyers that this duty applies to generative AI tools. As legal professionals, we share responsibility for protecting that information.

Before you paste anything into an AI tool:

- **Know your firm's policy.** Many firms approve specific tools and prohibit others. If your firm doesn't have a policy, ask.
- **Know the tool.** Free consumer versions may use what you type to train future models. Firm-licensed or enterprise versions usually have stronger privacy terms.
- **Strip identifying details.** Replace names, case numbers, and addresses with placeholders such as "Client A" or "[Case No.]" when you're using a tool that isn't firm-approved.
- **When in doubt, leave it out.** If you wouldn't email it to a stranger, don't paste it into an unapproved tool.

Safeguard 2: Verify Everything

AI tools write with confidence even when they're wrong. They can invent case citations, misstate deadlines, and get court rules subtly wrong. Courts across the country have sanctioned attorneys for filing briefs with fake citations generated by AI.

Treat every AI output as a first draft from someone who has never practiced law:

- Check every citation, statute, and rule against a primary source.
- Calculate deadlines yourself using the governing rules and your calendaring system.
- Read the whole output, not just the first paragraph.
- Make sure the attorney reviews anything that goes out the door.

AI can save you time on the draft. It can't take responsibility for the final product. That still belongs to the people whose names are on it.

Safeguard 3: AI Is Not a Lawyer

An AI tool is not an attorney, and nothing it produces is legal advice. It has no license, owes no duty to anyone, and carries no malpractice insurance. It doesn't know your client's full situation, and it may not reflect current law or local court rules.

That creates a real risk for legal professionals. California law prohibits anyone other than a licensed attorney from practicing law, and paralegals and legal assistants may not give legal advice. Relaying an AI tool's answer to a client doesn't change that. Keep these boundaries in mind:

- **Don't use AI to answer a client's legal questions.** Route those questions to the attorney, even when the AI answer sounds right.
- **Don't let AI make legal judgments.** Strategy, case evaluation, and interpreting how the law applies to the facts belong to the attorney.
- **Don't treat AI explanations as authority.** Use them to learn background concepts, then confirm anything that matters with primary sources or your attorney.
- **Use AI for support work.** Drafting, summarizing, organizing, and formatting are where it helps most, with an attorney reviewing the final work.

The same rule applies to your own life. If you ask an AI tool about your personal lease, divorce, or estate plan, treat the answer as general information and talk to a lawyer before acting on it.

Prompts to Try This Week

These are starting points. Adapt them to your practice area, and follow your firm's policy on what information you can include.

1. **Summarize a document:** "Summarize the attached deposition transcript in one page. List the key admissions with page and line references, then note any topics the witness avoided."
2. **Build a checklist:** "Create a step-by-step checklist for preparing a new client intake file at a civil litigation firm. Format it so I can print it and check items off."
3. **Polish an email:** "Rewrite this email to a client so it's warmer and easier to understand, but keep every fact and date exactly as written."
4. **Organize a chronology:** "Using only the facts below, create a chronology table with columns for date, event, and source document. Flag any dates that conflict."
5. **Learn something new:** "Explain the difference between a demurrer and a motion to strike in California, in plain language, for a legal assistant new to litigation."
6. **Tame your inbox:** "Here are my tasks for this week with their deadlines. Organize them by priority and suggest a daily plan."

The Bottom Line

You don't need to be a technology expert to get real value from AI. You need the same skills you already use every day: clear instructions, attention to detail, and a healthy habit of checking the work.

Start small. Pick one routine task this week, such as a summary, a checklist, or a first draft, and try it with a well-built prompt. Then verify the result, and notice how much time you saved. The legal professionals who learn to direct these tools well will be the ones shaping how our offices use them.



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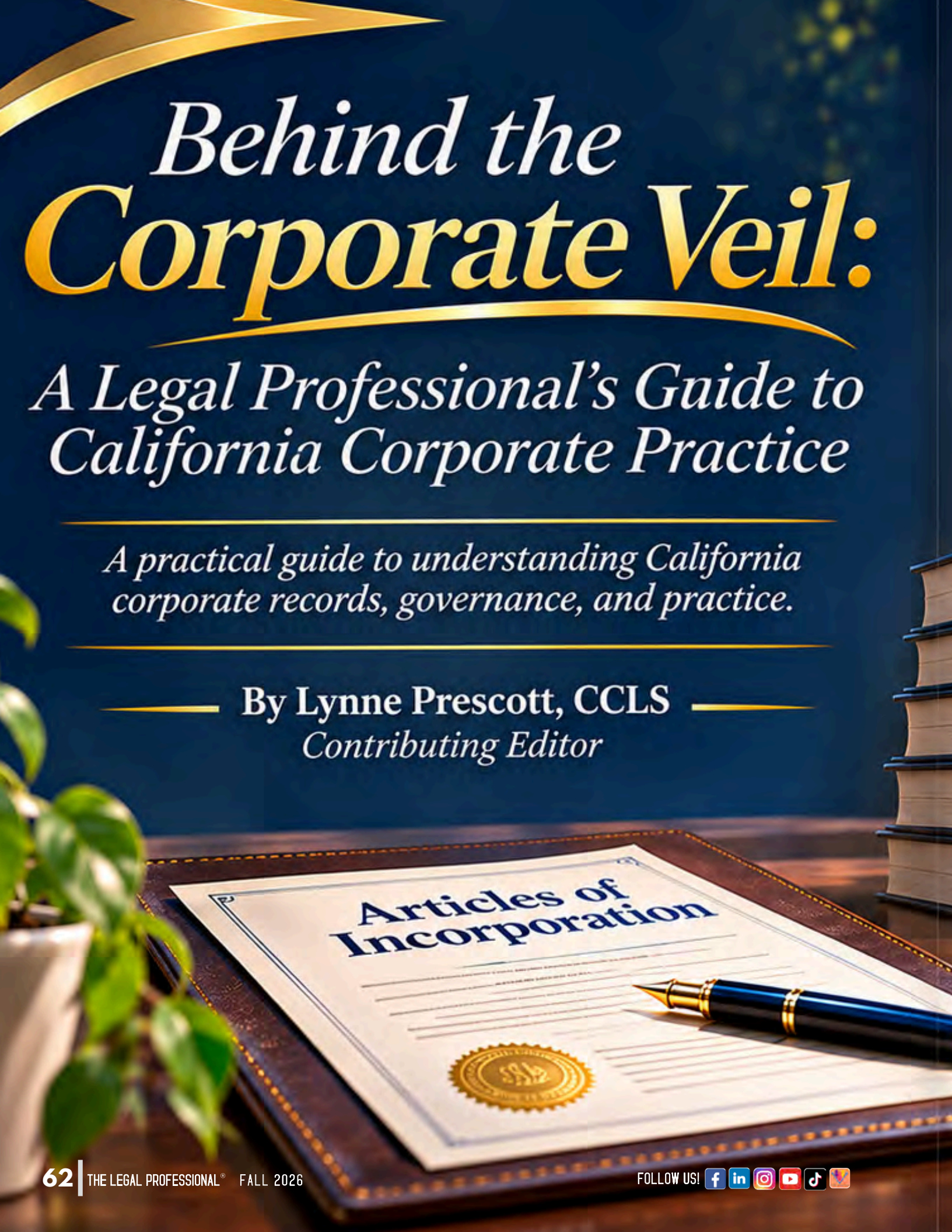
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Behind the Corporate Veil:

A Legal Professional's Guide to California Corporate Practice

A practical guide to understanding California corporate records, governance, and practice.

By Lynne Prescott, CCLS
Contributing Editor



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MINUTES
BYLAWS
STOCK RECORDS
RESOLUTIONS
CORPORATE RECORDS
CALIFORNIA REPUBLIC

For many legal professionals, the words *corporate law* conjure up images of thick minute books, Articles of Incorporation, stock certificates, resolutions, and perhaps a Statement of Information that someone suddenly realizes was due last month. Corporate practice can seem document-heavy, technical, and—particularly to someone accustomed to litigation—a little mysterious. But there is another way to look at it.

A corporation has a **legal life cycle**. It is created. It is organized. It makes decisions. It changes. It enters transactions. It develops a history. And, sometimes, it comes to an end. The documents in the corporate file tell that story.

Understanding that story is what transforms corporate work from a collection of forms and filings into something much more meaningful. And for the legal professional supporting a corporate practice, understanding *why* a document exists can be every bit as important as knowing where to file it.

This article focuses primarily on California stock corporations and is intended as a practical introduction rather than a comprehensive treatment of California corporate law.

It Starts With the Articles

A California corporation comes into existence by filing Articles of Incorporation with the California Secretary of State. Under California Corporations Code section 200, corporate existence begins upon filing of the Articles. That makes the Articles much more than another document in the corporate file. *They are the corporation's birth certificate.*

The Articles create the corporation. They do not, by themselves, fully organize it.

After formation comes organization. That is where the corporate record begins to take shape.

From Corporation to Operating Corporation

Once the Articles have been filed, the new corporation generally needs an organizational framework. This commonly includes bylaws, organizational action by the incorporator or initial directors, appointment of officers, authorization to issue shares, establishment of banking authority, and other actions necessary to begin conducting the corporation's affairs. Unlike the Articles, bylaws and meeting minutes are not filed with the California Secretary of State. They are internal corporate records. That distinction is important.

A Secretary of State business search may tell you that a corporation exists. It will not necessarily tell you how that corporation is governed, what its board has authorized, who owns its shares, or whether a particular transaction was properly approved. For those answers, you often have to go inside the corporate record.

THE CORPORATE RECORD IS TELLING YOU A STORY

Articles of Incorporation: tell you how the corporation began.

Bylaws: tell you how it is supposed to operate.

Minutes and written consents: tell you what it decided.

Stock records: tell you who owns it.

Statements of Information: *tell the public important current information about it.*

Amendments: *tell you what changed.*

Dissolution documents: *tell you how its legal life ended.*

Once you begin looking at corporate documents this way, the minute book stops being merely a binder full of paper. It becomes the corporation's institutional history.

Who Does What?

One of the first concepts a legal professional entering corporate practice should understand is that shareholders, directors, and officers are not interchangeable roles.

In the simplest terms:

Shareholders own.
Directors govern.
Officers manage.

Shareholders own shares in the corporation and exercise the voting rights associated with those shares. Among their most significant functions is the election of directors.

The board of directors is responsible for the overall governance of the corporation. California Corporations Code section 300 generally places the corporation's business and affairs under the direction of the board, subject to the provisions of the General Corporation Law and any limitations in the Articles.

The officers carry out the corporation's business and the decisions authorized by the board. Depending upon the corporation, those officers may include a president or chief executive officer, secretary, chief financial officer, and others established by the bylaws or appointed by the board.

In smaller closely held corporations, one person may wear several or even all of these hats. That can make the distinctions seem artificial.

Legally, however, the capacity in which a person is acting can matter.

WHO DOES WHAT?

Shareholders
Ownership
Elect directors
Vote on matters requiring shareholder approval

Board of Directors
Governance and oversight
Authorizes significant corporate action
Appoints officers

Officers
Management and execution
Carry out corporate business
Implement authorized decisions

Legal Professional
Documentation
Process
Calendaring and tracking
Filings
Record maintenance
Helping ensure the corporate record reflects what actually happened

That last function should not be underestimated.

Meetings, Minutes and Written Consents: Creating the Record

Corporations make decisions through people, but those decisions must often be documented as actions of the corporation. California Corporations Code section 600 provides for annual shareholder meetings for the election of directors and addresses

shareholder meetings generally. Corporate action may also occur through written consents where permitted by law.

Boards likewise act through meetings or permitted written consents. This is where minutes and resolutions become important. Minutes should not simply exist because "corporations are supposed to have minutes." They create a contemporaneous record of corporate action. Consider the difference between these two statements:

The corporation borrowed $500,000.

and

The board authorized the corporation to borrow $500,000 from a particular lender on specified terms and authorized designated officers to execute the loan documents.

The second tells us something the first does not: who had authority to make the corporation act? That question arises repeatedly in corporate practice.

- Who authorized the contract?
- Who approved the acquisition?
- Who elected the officer?
- Who authorized the issuance of shares?
- Who approved the lease?
- Who authorized the bank account?
- Who approved the merger?

The answer may be found in a resolution, minutes, written consent, bylaws, Articles, or a combination of corporate records. For the legal professional, that means drafting or assembling corporate documents should never become a mechanical exercise.

The better question is: what corporate action are we documenting, and what authority was required to take it?

The Minute Book: More Than Corporate Housekeeping

A well-maintained corporate minute book may contain some combination of:

- Articles of Incorporation and amendments
- Bylaws and amendments
- Incorporator action
- Minutes and written consents of directors
- Minutes and written consents of shareholders
- Stock issuance documents
- Stock ledger or capitalization records
- Significant resolutions
- Statements of Information; and
- Other records relating to the corporation's governance and history

The exact contents will vary. What should not vary is the underlying principle: the record should allow someone to reconstruct the significant legal events in the corporation's life. That becomes particularly important when something unusual happens.

A corporation seeks financing.
A shareholder sells shares.
The company is being acquired.
A founder leaves.
Litigation begins.
Due diligence is requested.
Someone questions whether a transaction was properly authorized.

Suddenly, documents that may have seemed like routine corporate housekeeping become evidence of what occurred years earlier. That is one reason good corporate recordkeeping matters.

Corporate Maintenance: Where Legal Professionals Shine

Corporate law is not limited to major transactions. Much of corporate practice

involves maintaining the entity after formation. That work may include calendaring recurring obligations, preparing annual corporate actions, maintaining current officer and director information, updating minute books, tracking stock records, obtaining certificates of status, monitoring changes to the corporation's registered information, and preparing or coordinating Secretary of State filings.

California stock corporations generally must file a Statement of Information annually with the Secretary of State. The responsibility to make the required filing belongs to the entity even if a reminder or delinquency notice is not received. That makes corporate maintenance a particularly good example of ownership without overstepping. The legal professional is not deciding who should serve as an officer or whether a particular corporate transaction should be approved. But the legal professional can recognize:

The annual filing is approaching.
The officers have changed.
The principal address is different.
The corporation completTd a transaction that needs to be reflected in its records.
The minute book has not been updated.
The corporate status needs to be checked before closing.

That is not practicing law. That is understanding the matter well enough to recognize when the file is asking a question.

PRACTICE ALERT:
BIZFILE ONLINE ACCESS CHANGED IN 2026

Effective August 1, 2026, the California Secretary of State requires user access for online Statement of Information filings through Bizfile Online.

The change is intended to give entities greater control over who may submit online filings on their behalf. A user who needs to make online filings for an entity must establish the appropriate access through the portal.

For legal professionals who routinely prepare or coordinate corporate filings, this is an important workflow issue. Do not discover on the day a filing must be submitted that the person responsible for filing has not established the required access.

Practice point: Treat access credentials and filing authority as part of the filing checklist—not as something to address after the document is ready to go.

When the Corporation Changes

Corporations rarely remain exactly as they were on the day they were formed. Names change. Addresses change. Officers and directors change. Shares are issued or transferred. Capital structures change. Articles or bylaws may be amended. Businesses merge, reorganize, convert, acquire other businesses, or qualify to conduct business in other jurisdictions. Each change raises its own questions:

What happened?
Who had authority to approve it?
What documents are required?
Does anything need to be filed?
What internal records must be updated?
Who else needs to know?

That last question is particularly useful. A change may affect more than one document.

Suppose a corporation changes its name. Filing an amendment may be only the beginning. The change may affect contracts, licenses, banking records, insurance, tax records, intellectual property registrations, foreign qualifications, business permits, letterhead, websites, and other records.

Corporate practice therefore rewards the legal professional who thinks beyond the immediate assignment. The assignment may be:

Prepare the amendment.

The better thought process is:

What does this change trigger?

Stock Records: A Small Record With a Big Job

Stock records deserve special attention because they can appear deceptively simple. A stock ledger or capitalization record documents ownership of the corporation's shares. Depending upon the circumstances, the corporate file may also contain stock certificates, subscription or purchase agreements, transfer documents, board approvals, securities-law documentation, and records concerning repurchased or cancelled shares.

This is an area where accuracy matters enormously. If the records do not clearly establish who owns what, a routine question can quickly become a very complicated one. Legal professionals working with stock records should therefore resist the temptation to "clean up" discrepancies by assumption. If the ledger says one thing, a certificate says another, and the board minutes suggest something else, that is not a clerical problem to quietly fix. It is an issue to identify and escalate.

OWNERSHIP WITHOUT OVERSTEPPING

Corporate practice provides countless opportunities to take ownership without making legal decisions. You can identify that documents conflict without deciding which document controls. You can recognize that approval appears to be missing without deciding that the transaction was invalid. You can flag that a filing is overdue without deciding how counsel should cure the problem. You can notice that the minute book does not reflect a major transaction without creating documentation after the fact on your own initiative.

Recognizing the issue is ownership. Deciding the legal consequence is counsel's job.

Good Standing Is Not Just a Phrase

"Is the corporation in good standing?" It sounds like a simple question. Sometimes it isn't.

A California corporation can encounter problems because of failures involving Secretary of State requirements or tax obligations. The California Franchise Tax Board explains that a suspended or forfeited business is not in good standing and loses its rights, powers, and privileges to conduct business in California.

Suspension can have serious consequences. Depending upon the basis for suspension, issues may arise concerning the corporation's ability to exercise corporate powers, maintain litigation, or enforce contracts. For that reason, checking corporate status should not be treated as a ceremonial step when status actually matters to the transaction or proceeding.

And if the status comes back **Suspended** or **Forfeited**, resist another temptation: do not assume the solution is simply to file whatever appears to be missing. There may be Secretary of State issues, Franchise Tax Board issues, or both. Revivor may require delinquent returns, payment of outstanding balances, filings, and additional steps depending upon the circumstances.

A status problem is a classic escalation moment.

PRACTICE ALERT:
"SUSPENDED" IS NOT A ROUTINE STATUS

If a corporate status search reveals that an entity is suspended or forfeited, do not treat it as a clerical irregularity. Identify the status. Preserve the information you found. Determine whether the matter has an immediate deadline, transaction, filing, contract, or litigation consequence. Bring it promptly to the attention of the responsible attorney.

The right question is not merely, *"How do we get this corporation active again?"* It is also, "What has happened—or needs to happen—while this corporation is suspended?"

When the Corporation Reaches the End

Just as formation is more than opening a file, dissolution is more than closing one. A corporation that stops conducting business does not necessarily cease to exist merely because the owners have walked away.

California law provides procedures for electing to wind up and dissolve a corporation and for completing the dissolution process. Depending upon the circumstances, shareholder approval and particular filings may be required. California also provides a short-form termination procedure for qualifying corporations in limited circumstances.

The winding-up process may involve resolving liabilities, collecting and disposing of assets, addressing contracts, making appropriate distributions, completing tax matters, and making the necessary state filings.

The practical lesson is simple: "We stopped doing business" and "the corporation has been legally dissolved" are not the same statement.

For a legal professional assisting with dissolution, a closing checklist can be invaluable. The corporation's final chapter deserves the same attention to documentation as its first.

The Corporate File Is a Timeline

Litigation professionals are accustomed to thinking in timelines.

Complaint.
Service.
Response.
Discovery.
Motions.
Trial.

Corporate practice has a timeline too. It simply looks different.

Formation → Organization → Governance → Maintenance → Change → Transactions → Dissolution

Once you see that timeline, individual corporate documents begin to make sense. A Statement of Information is no longer just a form. A board consent is no longer just a signature packet. A stock ledger is no longer

just a spreadsheet. An amendment is no longer just another Secretary of State filing. Each document occupies a place in the corporation's legal history. That changes the questions a legal professional knows to ask.

Before You Close the Corporate File

Whether you are forming a new corporation, preparing annual minutes, assisting with a transaction, updating a minute book, or winding an entity down, consider asking:

What happened?
Who had authority to approve it?
Where is that approval documented?
Does anything need to be filed?
Does anything else need to be updated?
Is there a deadline?
Who needs to know?
What happens next?

Those questions are not unique to corporate practice. They are the questions of a legal professional who sees beyond the assignment.

Corporate law may have its own vocabulary, statutes, forms, and procedures, but the underlying skill is familiar: understanding the legal process well enough to recognize where your work fits within it.



The goal is not to become corporate counsel. The goal is to understand enough of the corporation's story to recognize when the next page is missing. And sometimes, that is exactly what the legal team needs you to see.

AUTHOR'S PRACTICE NOTE

California corporate law encompasses far more than can be addressed in a single primer, including professional corporations, nonprofit corporations, benefit corporations, close corporations, foreign corporations, securities regulation, mergers and reorganizations, fiduciary duties, shareholder rights, and numerous industry-specific requirements. Legal professionals should consult the California Corporations Code, current California Secretary of State filing requirements, applicable tax authorities, and supervising counsel when working with a particular entity or transaction.



LYNNE PRESCOTT, CCLS
Contributing Editor, *The Legal Professional*®
LPI Past President 2020-2022

Lynne is a Past President of Legal Professionals Incorporated (2020–2022) and now serves as LPI's Legal Education Instructor, teaching advanced training courses and seminars. She contributes to *The Podium* blog and *The Legal Professional* magazine and is a past president of the Sacramento Legal Professionals Association. With over 40 years in the legal field, she is dedicated to making quality legal education accessible and affordable. Lynne is a Legal Administrative Assistant/Trainer with the San Diego based law office of Wilson Turner Kosmo LLP.

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ABOUT THE COURSE

- The content of this course is designed for legal secretaries and those studying for the California Certified Legal Secretary examination or those with a basic legal background.
- The modules for this class will be taken from the Beginning Legal Secretarial Training course and is intended for people that have worked in a law office but are new to civil discovery.
- Upon completion of the course, students will receive a certificate and/or credential badge from LPI.
- Each individual must register separately.
- Upon completion of the course, students will receive a certificate and/or credential badge from LPI.

TOPICS COVERED

- Interrogatories
- Demand for Production of Documents
- Requests for Admissions
- Depositions
- Demand for Physical Examinations
- Deposition Subpoenas
- Discovery Timelines and Service
- Verifications

COURSE FORMAT

- Classes will take place online utilizing video lectures, discussion boards, email, live Q&A sessions and quizzes.
- Login information will be provided the morning of the day class begins.

COST

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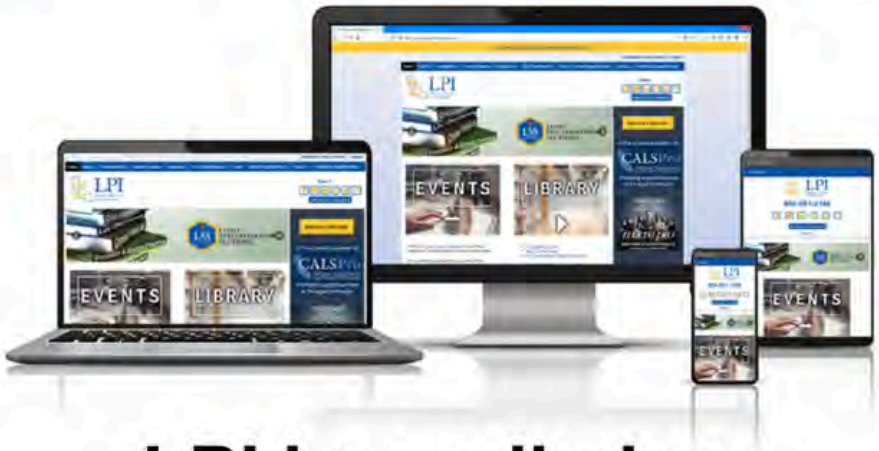
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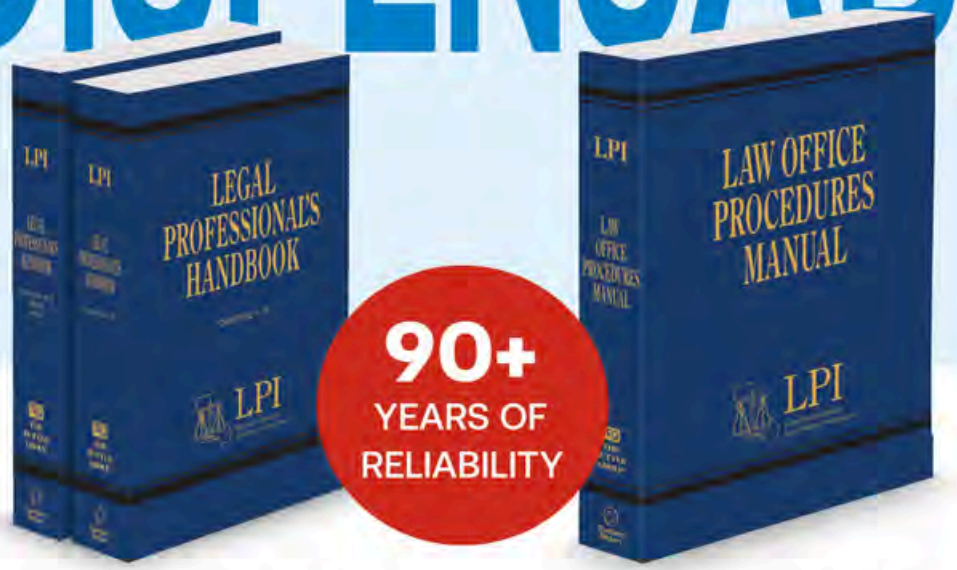
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CCLS QUIZ

TEST YOUR KNOWLEDGE. STAY A STEP AHEAD.

Answer Key

(CCLS QUIZ on page 67.)

BY VIVIAN SHREVE, CCLS

1. In civil litigation, if a Demand for Initial Disclosures is made by any party, how long does the responding party have to respond?

   a. 10 days b. 20 days c. 30 days d. 60 days

2. In an action to recover damages for personal injury or wrongful death, the defendant may at any time serve a Request for Statement of Damages. How many days does the plaintiff have to respond?

   a. 10 days b. 15 days c. 20 days d. 30 days

3. If there is no Request for Statement of Damages served, Plaintiff must give notice of the damages being sought before a default may be taken.

   a. True b. False

4. Electronically stored information is limited to emails, documents, presentations, databases, voicemail, text messages, audiovisual files, social media, and websites.

   a. True b. False

5. In real estate, a mortgage involves two parties, the borrower-mortgagor and the lender-mortgagee. Who are the three parties involved in a deed of trust?

   Borrower-Trustor; trustee; and lender-beneficiary

6. In an unlawful detainer action, a tenant may assert an affirmative defense against eviction if non-payment of rent was caused by a delay or interruption in Social Security or SSI benefits.

   a. True b. False

7. How many days does a tenant have to respond to a complaint for unlawful detainer that has been personally served?

   a. 5 court days b. 5 calendar days c. 10 court days d. 10 calendar days

8. In family law matters. The residency requirements are that the petitioner or respondent must have lived in the state for six months immediately preceding the filing for dissolution. How long must they live in the COUNTY where the petition is filed?

   a. 3 months b. 6 months c. 9 months d. 12 months

9. If no demand for money, property, costs, or attorney fees is contained in the petition, and judgment is to be entered by default, the filing of property declaration and financial statements shall not be required.

a. True b. False

10. In family law matters, when child, family or spousal support are at issue, the parties' state and federal tax returns may be discoverable.

a. True b. False

11. In family law matters, where custody or visitation of a minor child is in dispute, mediation will NOT be ordered unless specifically requested.

a. True b. False

12. What is the proper jurisdiction for probate proceedings?

a. Probate Court b. Superior Court c. Municipal Court d. Supreme Court

13. In an estate matter, when are the estate taxes due?

a. 3 months after death b. 6 months after death
c. 9 months after death d. April 15 of year following date of death

14. When naming a corporation, the words *Olympic* and *Olympiad* may violate federal law unless specifically permitted by the U.S. Olympic Committee.

a. True b. False

15. Every corporation must file a Statement of Information within 90 days after the date of incorporation, and then how often thereafter?

a. Every six months b. Every two years
c. Every year d. Only when there is a significant change



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LEGAL TECHNOLOGY TRAINING

AI Tools for Legal Professionals:

Gemini, ChatGPT & Claude



Presented by:

June Hunter

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Tuesday, January 5, 2027

12:00 p.m. - 1:00 p.m.

WEBINAR

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About the Instructor

June Hunter

June Hunter is a Technical Enablement Sr. Specialist at DISCO and teaches computer essentials at UC San Diego Division of Extended Studies in their ABA-approved Paralegal Studies program.

Go to www.legalprofessionalsinc.org/events/ to register.

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LEGAL TECHNOLOGY TRAINING

LPI LEGAL PROFESSIONALS INCORPORATED
Educating California's Legal Support Professionals

LPI UNIVERSITY

NextGen Legal

LIVE WEBINAR

The Deposition Process in California



January 13, 2027
12:00 p.m. - 1:00 p.m.

LPI Member – $25
Non-Member – $55

Presented By:
Vanessa Buffington
NextGen Legal, LLC

ABOUT THE SPEAKER

Vanessa is the owner of NextGen Legal, LLC, and has over 22 years of experience in the legal field. She is a certified paralegal with extensive expertise in handling transactional and litigation matters on the plaintiff and defense side, in both the public and private sectors. Her experience encompasses multiple areas of law such as labor and employment, insurance defense, construction defect, education, personal injury, medical malpractice, investigations, business, and labor relations and negotiations.
Currently, Ms. Buffington conducts training, seminars and webinars for legal professionals. She has been part of Legal Professionals Incorporated's instruction team since 2017.

WEBINAR DESCRIPTION

Noticing a depositing is more than just picking a date and time and serving notice on parties in a case. Where can a deposition be taken? Do you need records to be produced? Who can be deposed and what language is proper in a deposition notice? In this webinar you will learn the ins and outs of deposition procedures in California.

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CCLS

LPI Finds Its Oasis *in Palm Springs*

By Larry McGrew | LPI Executive Secretary



CALDA attendees and LPI representatives at the annual conference.







The desert sun was blazing in Palm Springs, but it was no match for the energy inside the Hilton Hotel. LPI President Bettina Herrick-Jacobson and I represented LPI as an exhibitor at the California Association of Legal Document Assistants (CALDA) Annual Conference on October 8–10, 2026, marking LPI's third appearance at this event. The theme, "A Legal Oasis: Filling the Justice Gap in California," promised something every professional looks for: Opportunity.

This meant two kinds of opportunity: learning opportunities for the Legal Document Assistants (LDAs) in attendance, and the opportunity for LPI to network and grow our membership by welcoming more LDAs into our community. We came to show CALDA's membership how our educational programs can support them at every stage of their careers.

Meeting California's LDA Community

More than 100 attendees filled the hotel, and we made the most of every conversation at our exhibit table. Introducing LPI as an educational resource within California's legal industry gave us the chance to connect directly with the people who serve self-represented Californians every day, and to show how our programs can sharpen their knowledge, skills, and professional standing.

We were also glad to see familiar faces. LPI has members who are LDAs, and many attendees told us they follow LPI and really enjoy the wide variety of educational courses we provide, especially online. For LDAs who are not yet members, each of those conversations was an open invitation to join LPI.

Three Tracks, Many Learning Opportunities

While the desert heat shimmered outside, the real action was in the educational rooms. Attendees could dive into three learning tracks: Civil, Family Law, and Probate, throughout each day. For LDAs, that kind of focused, practical instruction is exactly what keeps a

practice sharp, and it is the same commitment to continuing education that drives everything we do at LPI.

Speed Mentoring and Lunch with a Buddy

One of my favorite parts of the conference, outside of meeting and connecting with attendees, was the speed mentoring and the "lunch with a buddy" activity. The speed mentoring felt familiar, but the lunch with a buddy was interesting to me. They paired experienced LDAs with first-time attendees or those relatively new, turning a room full of strangers into a network of colleagues. It was a powerful reminder that opportunity does not only come from a classroom. It also comes from a connection with a seasoned professional willing to share what they have learned with someone just getting started.

A Breadth of Education Unmatched

No other legal education provider offers as many programs as LPI, and that was the heart of our message to attendees. That breadth matters to LDAs, whose work spans a wide range of practice areas and who are expected to keep learning and earning CLE credits throughout their careers. Whether an attendee was just starting out or had years of experience, we were able to point to educational offerings that fit where they are and where they want to go.

Building Local Connections

Many of the LDAs we spoke with expressed interest in joining local associations, including Placer County Legal Professionals Association, Desert Palm Legal Professionals Association, Los Angeles Legal Secretaries Association, and San Diego Legal Secretaries Association. That was encouraging to hear. Local associations give members a place to learn from peers, share experience, and stay connected to the profession, and we look forward to supporting those chapters and the professionals who join them.

Looking Ahead

On behalf of Bettina and myself, thank you to CALDA for welcoming LPI as an exhibitor, and to every attendee who stopped by our table. And a special thank you to Palm Springs for such a warm welcome. We mean that literally: between the desert sun and the buzz at the event, it was a positively warm experience all around. It reminded us that the best opportunities, like the best oases, are worth seeking out. LPI exists to give legal professionals the education they need to serve their clients with confidence, and we are eager to welcome more LDAs into our membership.







> *"Opportunity also comes from a connection."*

If you are a Legal Document Assistant, or know one who would like to learn more, we would love to hear from you. Visit us at www.legalprofessionalsinc.org or email us at info@legalprofessionalsinc.org.

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THURSDAY, DECEMBER 17, 2026

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CHAMPAGNE HOLIDAY BUFFET

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An evening of fun, legal shenanigans, and lots of holiday spirit!

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For more information, email Programs@SacLPA.org

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Calendar of Events

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NOV 2026

STATEWIDE EDUCATION • LOCAL ASSOCIATION EVENTS • LISTED IN DATE ORDER

WED 4 NOV
LOCAL ASSOCIATION
Evictions Are Changing in California: Know the Code, Know the Rules!
6:15–7:15 p.m. program
Stanislaus County Legal Professionals Association

FRI 6 NOV
CONFERENCE
LPI Fall Educational Conference
Nov. 6–8 • Pomona
Fall Into Excellence: Gather • Grow • Thrive.

MON 9 NOV
WEBINAR
Beyond the Vault: Digital Assets in Estate Planning
12:00–1:00 p.m.
With Lynne Prescott, CCLS

TUE 10 NOV
MULTI-WEEK COURSE
Overview of California Discovery
Self-paced online
8-week course covering discovery procedures.

TUE 10 NOV
MULTI-WEEK COURSE
Beginning Legal Secretarial Training
Self-paced online
8-week foundational legal office training.

TUE 10 NOV
MULTI-WEEK COURSE
Trial Preparation
Self-paced online
8-week training in pretrial and trial tasks.

TUE 10 NOV
WEBINAR
Think Before You Post: Social Media & Ethics
12:00–1:00 p.m.
With Bethany Ensz, M.S.
Confidentiality and ethical online conduct.

WED 11 NOV
WEBINAR
Notice of Appeal: What Should Be on Your Checklist?
12:00–1:00 p.m.
With Vanessa Buffington

SAT 14 NOV
LOCAL ASSOCIATION
Polished & Prepared: Career Ready Event
9:00 a.m.–12:00 p.m.
San Diego Legal Secretaries Association
Career development and preparation.

SAT 14 NOV
LOCAL ASSOCIATION
Fall Silent Auction & Festive Food
2:00–6:00 p.m.
Fresno County Legal Professionals Association
Auction, raffle, dinner and bake sale.

MON 16 NOV
LOCAL ASSOCIATION
95 Years of Excellence: Murder Mystery Prom
5:00 p.m. doors
San Diego Legal Secretaries Association
1980s prom-themed anniversary event.

TUE 17 NOV
MULTI-WEEK COURSE
Advanced Discovery
Self-paced online
6-week advanced discovery course.

TUE 17 NOV
MULTI-WEEK COURSE
Appellate Procedures: California & Ninth Circuit
Self-paced online
8-week course on state and federal appeals.

TUE 17 NOV
WEBINAR
Style Savvy: Word Tables of Contents
12:00–1:00 p.m.
With June Hunter
Styles, numbering and automatic TOCs.

Details & registration: LegalProfessionalsInc.org/events
As listed November 4, 2026 • Times Pacific unless otherwise stated • Verify details before attending

LEGAL PROFESSIONALS INCORPORATED

Calendar of Events

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DEC 2026 — JAN 2027

STATEWIDE EDUCATION • LOCAL ASSOCIATION EVENTS • LISTED IN DATE ORDER

TUE 1 DEC
WEBINAR
PowerPoint Essentials for Legal Professionals
12:00–1:00 p.m.
With June Hunter
Create professional presentations and slides.

THU 3 DEC
WEBINAR
Bulletproof Service of Process
12:00–1:00 p.m.
With Jonathan Shisler
FREE for LPI Members — **Join TODAY!**

FRI 4 DEC
LOCAL ASSOCIATION
Annual Holiday Luncheon
11:30 a.m. welcome
Santa Maria Legal Professionals Association
Holiday luncheon; lunch begins at noon.

FRI 4 DEC
LOCAL ASSOCIATION
See's Candy Fundraiser: Order Deadline
Orders through Dec. 4
Alameda County Legal Secretaries Association
Order online; shipping begins Nov. 10.

WED 9 DEC
WEBINAR
Preparing an Appendix: California Court of Appeal
12:00–1:00 p.m.
With Vanessa Buffington

WED 9 DEC
LOCAL ASSOCIATION
Annual Holiday Party
6:00–8:00 p.m.
Santa Clara County Legal Professionals Association
Association holiday celebration.

TUE 5 JAN
WEBINAR
AI Tools for Legal Professionals
12:00–1:00 p.m.
With June Hunter
Gemini, ChatGPT and Claude in legal workflows.

WED 6 JAN
LOCAL ASSOCIATION
2027 Legal Secretary Training Course
6:00–8:15 p.m.
San Diego Legal Secretaries Association
Legal secretary training course begins.

THU 7 JAN
MULTI-WEEK COURSE
CCLS® Online Study Group Begins
Jan. 7–Mar. 11
Self-paced preparation for the CCLS exam.

THU 7 JAN
WEBINAR
Rules of Professional Conduct: Part 1
12:00–1:00 p.m.
With Heather L. Rosing & Joanna Lee Mischer
FREE for LPI Members — **Join TODAY!**

MON 11 JAN
WEBINAR
Beyond the Assignment: A High-Trust Partnership
12:00–1:00 p.m.
With Lynne Prescott, CCLS

TUE 12 JAN
WEBINAR
Communication & Diligence: Client Trust
12:00–1:00 p.m.
With Bethany Ensz, M.S.
Client communication and follow-through.

WED 13 JAN
WEBINAR
The Deposition Process in California
12:00–1:00 p.m.
With Vanessa Buffington
Notices, records and deposition procedures.

WED 13 JAN
LOCAL ASSOCIATION
AI for the Modern Law Firm
6:30–7:30 p.m. program
Santa Clara County Legal Professionals Association
Better prompts, practical uses and policies.

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LEGAL PROFESSIONALS INCORPORATED

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JAN 2027 — FEB 2027

STATEWIDE EDUCATION • LOCAL ASSOCIATION EVENTS • LISTED IN DATE ORDER

THU 14 JAN
WEBINAR
Rules of Professional Conduct: Part 2
12:00–1:00 p.m.
With Heather L. Rosing & Joanna Lee Mischer
FREE for LPI Members — Join TODAY!

TUE 19 JAN
WEBINAR
You're on Mute! Zoom & Teams Basics
12:00–1:00 p.m.
With June Hunter
FREE for LPI Members — Join TODAY!

MON 25 JAN
LOCAL ASSOCIATION
New Year! New Rules! Court Updates
7:00–8:00 p.m. program
San Diego Legal Secretaries Association
San Diego Superior Court updates.

TUE 26 JAN
WEBINAR
Refresh Yourself: Why Breaks Matter
12:00–1:00 p.m.
With Bethany Ensz, M.S.
FREE for All Legal Professionals

WED 27 JAN
WEBINAR
Expert Discovery
12:00–1:00 p.m.
With Vanessa Buffington
Expert witnesses, deadlines and depositions.

SAT 6 FEB
LOCAL ASSOCIATION
16th Annual Crab Feed
5:30–8:30 p.m.
Santa Clara County Legal Professionals Association
Annual local association fundraiser.

MON 8 FEB
WEBINAR
Everything Is Urgent! Managing Legal Work
12:00–1:00 p.m.
With Lynne Prescott, CCLS
Deadlines, priorities and competing demands.

TUE 9 FEB
WEBINAR
Microsoft Copilot: Practical AI Workflows, Part I
12:00–1:00 p.m.
With June Hunter

WED 10 FEB
WEBINAR
Table of Contents: Document Mastery
12:00–1:00 p.m.
With Vanessa Buffington
Word styles, TOCs and document navigation.

TUE 16 FEB
WEBINAR
Microsoft Copilot: Advanced Workflows, Part II
12:00–1:00 p.m.
With June Hunter

FRI 19 FEB
CONFERENCE
LPI February Quarterly Conference
Feb. 19–21 • Walnut Creek
Save the date • Embassy Suites by Hilton.

TUE 23 FEB
WEBINAR
Legal Writing: Holdings & Briefing Cases
12:00–1:00 p.m.
With Bethany Ensz, M.S.
Identify holdings, dicta and legal principles.

TUE 23 FEB
LOCAL ASSOCIATION
Federal Court Annual Updates 2027
7:00–8:00 p.m. program
San Diego Legal Secretaries Association
Federal court changes and updates.

WED 24 FEB
WEBINAR
Formatting Pleadings & Discovery
12:00–1:00 p.m.
With Vanessa Buffington
Produce accurate, professionally formatted filings.

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FRESNO COUNTY
LEGAL PROFESSIONALS
ASSOCIATION
SUPPORT • EDUCATE • CONNECT

NOVEMBER 14, 2026

Fall SILENT AUCTION

Presented by: Fresno County Legal Professionals Association

Time: TBD
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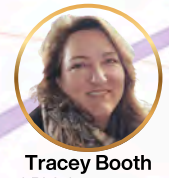
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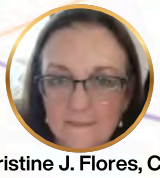
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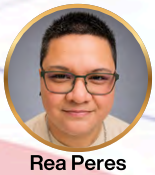
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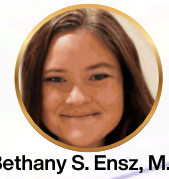
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