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THE OFFICIAL PUBLICATION OF LEGAL PROFESSIONALS INCORPORATED • SUMMER 2026



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RECONNECTING A LEGACY:

A CALL TO REVITALIZE THE BEVERLY HILLS CENTURY CITY
LEGAL SECRETARIES ASSOCIATION

BY DONNA DAY

Executive Advisor 2026-2028, Legal Professionals Incorporated
→→→ LPI Past President 2024-2026 ←←←



For decades, the Beverly Hills Century City Legal Secretaries Association (BHCCLSA) served as a respected professional home for legal support staff—championing excellence, mentorship, education, and advancement within the legal profession. As a proud local association of Legal Professionals Incorporated, BHCCLSA provided a dynamic network where members could grow professionally, build lasting relationships, and contribute meaningfully to the legal community.

Today, we are reaching out with a renewed vision—and an invitation.

A Call to Past and Present Members

If you have ever been a member of the Beverly Hills Century City Legal Secretaries Association—or if you currently work within the legal profession in the Beverly Hills and Century City communities—we invite you to reconnect.

Together, we have an extraordinary opportunity to restore and reimagine this association as a thriving, modern professional network dedicated to supporting today's legal professionals while honoring the legacy that came before us.

Our mission is simple yet powerful:

**To revitalize this local association,
strengthen professional connections,
and create new opportunities for
education, leadership, mentorship,
and community engagement.**

Why Revitalization Matters

The legal profession continues to evolve rapidly. Legal secretaries, practice assistants, paralegals, and administrative professionals play a more strategic and indispensable role than ever before. Yet despite these changes, the need for professional community, mentorship,

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LPI | **CODE OF ETHICS**

It shall be the duty of each member of Legal Professionals Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

Dedicated to LSI Post President,
Joan M. Moore, PLS, CCLS



PRESIDENT'S MESSAGE

LPI PRESIDENT BETTINA HERRICK-JACOBSON



EMPOWERING LEGAL PROFESSIONALS THROUGH KNOWLEDGE AND CONNECTION

It is with profound gratitude and a deep sense of responsibility that I step into my role as the 50th President of Legal Professionals Incorporated (LPI)—and as the first President from Placer County Legal Professionals Association. This milestone is not just a personal achievement; it reflects the evolving and inclusive nature of our organization and the many pathways that bring individuals into the legal profession.

My journey into the legal field was not carefully planned. In fact, it began during a time of uncertainty and challenge.

In 2011, I was laid off from a position I had held for many years. At 47 years old, I suddenly found myself having to redefine my professional future. Rather than retreat, I made a decision: I would treat finding a new career as my full-time job. Each day, I committed myself to rebuilding—not just a résumé, but a sense of purpose.

While working on my résumé at a job center, I learned about a program designed to help individuals transition into new careers. I took that opportunity, and eighteen months later, I proudly earned my Paralegal Certificate.

Like many entering the legal field, I had a clear vision of where that credential would take me. However, life had other plans.

Although I did not secure a position as a paralegal, I found a meaningful and fulfilling role within the court system. Today

Today, I serve as a courtroom clerk—a position I hold with pride and deep respect for the important work it represents. I will candidly admit that there were moments when I felt “less than,” believing I did not quite fit the traditional mold of a legal professional. I was not a paralegal, legal secretary, or practice assistant. Yet, over time, I came to a critical realization: our profession is not defined by titles—it is defined by service.

Legal Professionals Incorporated reflects that truth. Our membership includes individuals engaged in legal work across California—from attorneys to support staff, from court employees to those serving in institutions that provide legal services. I am employed by the courts, and that makes me part of this profession—and part of this association.

What unites us is not our job titles, but our shared commitment to service, growth, and excellence.

At its core, LPI is an organization of volunteers—dedicated professionals who support one another through education, mentorship, and collaboration. Our mission remains simple yet powerful: educating California legal support professionals.

As I reflected on the leadership of those who came before me, I found common threads in their vision: a commitment to doing our best, empowering one another, strengthening

our community, and embracing the journey of professional growth.

From these ideas, I developed the theme that will guide my presidency: “Empowering Legal Professionals through Knowledge and Connection”.

This theme is more than a phrase—it is a commitment to action.

I step into this role not with every answer, but with a clear purpose: to help LPI continue to grow by expanding educational opportunities and strengthening the connections that unite our members across the state.

Encouragingly, we are already seeing positive momentum. Through our partnership with Q2 Mark, LPI has engaged in targeted outreach on platforms such as Facebook and LinkedIn. Since the end of February, this effort has resulted in 32 new members joining our organization.

This growth reflects more than successful marketing—it signals that legal professionals throughout California are actively seeking education, community, and connection. LPI is uniquely positioned to meet those needs.

A key focus moving forward will be reaching the next generation of legal professionals.

Earlier this year, I attended an event at American River College’s Paralegal Studies Program alongside members of Sacramento Legal Professionals Association. Speaking with students there was both inspiring and reaffirming. I shared a simple yet important message: earning a certificate or degree is not the finish line—it is the beginning.

In a legal landscape that continues to evolve, ongoing education is essential. It must be intentional, it must be accessible, and it must be lifelong. LPI plays a vital role in supporting that continued growth by providing resources, training, and opportunities for professional development.

To remain relevant and impactful, we must meet individuals where they are—whether they are students just beginning their careers or seasoned professionals seeking to expand their knowledge.

We must create pathways for mentorship.

We must provide meaningful educational opportunities.

And we must demonstrate that LPI is a place where individuals can belong, grow, and thrive.

At the same time, we must embrace change.

The organization we see today is not the same as it was years ago—and that is a testament to its strength. Since joining LPI in 2012, and particularly during my time serving on the Executive Committee, I have witnessed thoughtful and meaningful transformation.

Change is not always easy, but it is necessary. To grow our membership, strengthen our presence, and support future professionals, we must continue to evolve—not by losing our identity, but by building upon the strong foundation that has always defined us.

Over the next two years, my leadership will focus on three key priorities:

- Enhancing visibility and digital presence, building on current marketing success while exploring new ways to reach prospective members;
- Expanding educational programming, including webinars, workshops, conferences, and continuing education opportunities for legal professionals at every stage of their careers;
- Strengthening connection and collaboration among members statewide, ensuring that knowledge, support, and opportunity are shared broadly and equitably.

These priorities are rooted in a simple truth: no one succeeds alone. The strength of LPI has always come from individuals willing to volunteer their time, share their expertise, and invest in the success of others.

As I begin this chapter, I am deeply grateful for the support that has brought me here. I extend my sincere thanks to the members of Placer County Legal Professionals Association, Sacramento Legal Professionals Association, and the entire

LPI community. I am equally thankful for my family, whose encouragement has sustained me throughout this journey.

I would also like to acknowledge Jennifer L. Page, CCLS, LSI Past President 2016-2018, whose invitation in 2016 opened the door for my involvement at a deeper level. That moment set me on a path that ultimately led to this opportunity to serve.

As I take on the responsibilities of President, I do so with humility, gratitude, and optimism for the future.

I am hopeful—for continued growth, for stronger connections, and for an LPI community in which every legal professional, regardless of title or starting point, knows there is a place for them.

Together, we will continue empowering legal professionals through knowledge and connection.



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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LPI LEGAL
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Educating California's Legal Support Professionals

LPI PRESIDENT *Bettina Herrick-Jacobson* CELEBRATION LUNCH



Date: Saturday, September 26, 2026



Time: 1:00 PM



Location: High-Hand Café & Nursery
3750 Taylor Road, Loomis, CA 95650



Cost: \$50 per person



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RSVP

Seating is limited.

Kindly RSVP no later than
September 11, 2026 to:

✉ rmalerbi@marrslawpc.com

MENU OVERVIEW

Lunch will be served family-style in two courses.

Please note: The café is unable to accommodate special dietary requests.

STARTERS:

- House-made chips & dip
(potato chips with lemon artichoke dip)
- Caesar salad
(romaine, golden raisins, pistachios,
aged parmesan, kalamata olives)

MAIN COURSES:

- Wood-fired bacon & pear pizza
(blue cheese, caramelized onion, fig reduction)
- Chicken salad sandwich
(rotisserie chicken, romaine, honey wheat bread)
- Brisket hash
(smoked brisket, potatoes, onions,
peppers, Maple Rock eggs)
- Classic Benedict
(applewood smoked ham, poached eggs,
biscuit, hollandaise)

BEVERAGES:



Iced tea and lemonade
will be provided.

Alcoholic beverages, soft drinks,
coffee, and specialty drinks will be
available for purchase separately.



LEGISLATIVE ALERT!

BY LYNNE PRESCOTT, CCLS

Contributing Editor, *The Legal Professional*®

Legislative Update

Peremptory Challenges in Civil Jury Selection

One of the biggest practical changes for trial lawyers this year is the continued implementation of **Code of Civil Procedure section 231.7** in civil jury trials. The statute significantly limits traditional peremptory challenges that appear motivated by implicit bias. Instead of simply exercising a peremptory strike, attorneys now need to be prepared to articulate race-neutral and legally acceptable reasons if challenged.

For trial teams, this means:

- voir dire preparation is more important than ever
- attorneys should document reasons for strikes
- legal assistants helping prepare jury notebooks should understand the standards

This affects both trial strategy and procedure.

Initial Disclosure Rules Continue

California's experiment with mandatory initial disclosures continues. Rather than allowing the disclosure requirements to sunset, the Legislature extended them, meaning litigators should continue expecting early exchanges of witnesses, documents, insurance information, and damages calculations in qualifying civil actions.

This is one of those procedural developments that is quietly changing litigation practice.

Service of Summons Changes (SB 85)

Another practical update affects service of process. SB 85 made changes intended to modernize and clarify service procedures in civil litigation. While it doesn't dramatically alter day-to-day calendaring, firms should review their service protocols to ensure compliance.

AB 747 (SPARE Act)

AB 747, which was enacted in 2026 and more commonly known as the SPARE Act, continues to capture the attention of the legal community. Set to become effective January 1, 2027, this Act is the Legislature's response to concerns over so-called "sewer service" — situations where a proof of service is filed even though the defendant was never actually served. The Legislature's stated purpose is to strengthen due process protections while creating better documentation of service.

This is one of those bills that, on its face, looks like it's "just about process servers," but I don't think that's where its biggest impact will be. The real change is that service of process becomes an evidentiary issue much earlier in the life of a case.

One thing I would encourage legal professionals to start doing now is to develop the habit of reviewing proofs of service with the same critical eye they already use for declarations or supporting evidence. Questions such as:

- Does the proof establish that substitute service was actually authorized?
- Are the dates internally consistent?
- Was the correct address used?
- Do the attempts satisfy the statutory requirements?
- If opposing counsel files a motion to quash six months from now, do we already have everything we need to defend the service?

Those aren't traditionally thought of as "legal assistant questions," but they absolutely become case management questions. Anticipating the next procedural step is what moves someone from simply processing paperwork to contributing strategically to the case.

I also suspect we're going to see a shift in how law firms work with process servers. Firms that have longstanding relationships with professional servers who already document their work thoroughly will probably experience a relatively smooth transition. Others may find themselves asking for additional documentation or even revising their engagement instructions and checklists.

One other thing to keep an eye on is whether the Judicial Council revises its Proof of Service forms before January 1. Even if the statute doesn't require an entirely new form, I wouldn't be surprised to see updated forms, advisory comments, or guidance reflecting the new documentation requirements.

Finally, if the Legislature does amend the retroactivity provisions of the Act during the remainder of the 2026 legislative session, that will be one of the first things we will all need to know. Currently, it's the one part of AB 747 that still seems to be generating the most discussion among practitioners.

This legislation is exactly the kind of procedural change that can have a significant impact on litigation practice, and I think it's worth keeping on everyone's radar as we approach January 2027.



Items I'm Watching for Fall 2026

These are proposals or developing issues (not yet final statewide procedural changes), but they could become important:

- additional electronic filing modernization
- further discovery reforms
- continued AI regulation affecting legal practice
- judicial branch technology initiatives
- possible updates to remote proceedings

Statements of Decision—Coming in 2027

While not effective yet, it's worth mentioning now. Beginning **January 1, 2027**, the rules for requesting Statements of Decision after bench trials become uniform regardless of trial length. Currently, different deadlines apply depending on how long the trial lasted. The Legislature eliminated that distinction, which, in civil procedure, is a welcome simplification.

California Legal Updates

PACER Updated Password Standards Enforcement (Effective August 17, 2026)

Beginning August 17, 2026, PACER users who have not updated their password in the last 18 months will be randomly selected to update their password to comply with the updated password standards. Strong passwords are essential in safeguarding systems from unauthorized access. The new password must:

- Be 14-45 characters in length.
- Contain at least one lowercase letter, one uppercase letter, and one special character (all special characters are allowed).
- Not contain any part of your first name, last name, username, or email address.
- Passwords must also be updated every 180 days. This will help reduce the risk of extended use of compromised passwords.

Impacted users will be prompted to update their password upon login. Users may skip the process three times before their account is locked. Once an account is locked, users will not be able to perform any activity until they change their password. Users are encouraged to update their password as soon as possible.

In preparation, users should ensure that they know their security questions and answers and have access to the email address associated with their PACER account in the event they need to reset their password. If users do not know their security questions and answers, they should contact the PACER Service Center for assistance. Users sharing their account should coordinate with their teams to avoid locking each other out. Finally, if using third-party software, users should check if they need to take any additional action as it relates to that software.

If you have any questions, please contact the PACER Service Center at (800) 676-6856 or pacer@psc.uscourts.gov. The PACER Service Center hours of operation are Monday through Friday 8 a.m. to 6 p.m. CT.

Judicial Council Form Mid-Year Updates

Effective July 1, 2026, California's Judicial Council made revisions to several of the most commonly used forms:

- Civil Case Cover Sheet
- Complaint – Unlawful Detainer
- Writ of Execution
- Notice of Levy (Enforcement of Judgment)
- Wage Garnishment Forms

For more information, visit <https://courts.ca.gov/forms-rules/court-forms/latest-changes>

California Rules of Court Updates (Effective July 1, 2026)

The Judicial Council adopted another round of rule changes effective July 1, 2026. While many are administrative, they include updates affecting filing practices, appellate procedure, and judicial administration. These updates are worth reviewing every July because they often contain "quiet" procedural changes that practitioners miss.

"Knowing the Code is only half the job. The Rules of Court often tell you how to use the Code."



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.



Notice to Attorneys

MediaAffairs@lacourt.ca.gov

Superior Court of Los Angeles County Issues General Order Regarding Code of Civil Procedure Section 170.6 Peremptory Challenges

General Order 2026-GEN-010-00, Effective Immediately, Requires Written Declaration or Oral Attestation with Specified Information With All C.C.P. 170.6 Motions

July 28, 2026

The Superior Court of Los Angeles County today announced the issuance of [General Order 2026-GEN-010-00](#), effective immediately, establishing new procedures for peremptory challenges under Code of Civil Procedure section 170.6. The order implements the California Supreme Court's recent decision in *J.O. v. Superior Court of San Joaquin County* (2026) 19 Cal.5th 753, 589 P.3d 822. ("J.O.").

"In light of the Supreme Court's recent decision in *J.O.*, the Court is issuing this General Order to establish a clear, uniform process for section 170.6 challenges—one that sets firm expectations for parties, attorneys, and judicial officers and ensures these challenges are made responsibly and consistently," said Presiding Judge Sergio C. Tapia II. "This structure is essential to aligning the Court with the *J.O.* decision, preserving the integrity of judicial operations, and maintaining public confidence in the fair and effective administration of justice."

[General Order 2026-GEN-010-00](#) addresses the serious problem of bad faith blanket challenges under section 170.6, a practice the California Supreme Court in *J.O.* found harmful to judicial operations. As the Court explained, such challenges may be misused to shop for a preferred judge, delay proceedings, disqualify a judge based on the judge's views on the law or personality traits, intimidate or punish a judge for past rulings, or even serve as a vehicle for racial discrimination. These harms are heightened when a party challenges a particular judge in all or a substantial portion of the judge's assigned cases, or in all or a substantial portion of cases of a certain type, without any good faith belief in actual prejudice.

In *J.O.*, the Supreme Court identified factors that may establish that a party is engaging in bad faith blanket challenges, including persistent strikes against the same judge "in all or a substantial portion of cases assigned to that judge," a marked increase in section 170.6 challenges following an adverse ruling, or an explicit blanket challenge policy.

To assist the Court and interested parties in promptly determining whether a section 170.6 challenge constitutes a bad faith blanket challenge under *J.O.*, General Order 2026-GEN-010-00 requires any party or attorney making a challenge to provide a verified written declaration or oral attestation under penalty of perjury disclosing their recent history of challenges to the assigned judge. The order also mandates contemporaneous submission and timely service of the declaration.

The declaration or attestation must include the name and case number of every case in which the party and/or attorney (law firm) made a section 170.6 challenge to the challenged judge within the previous year, together with a reasonable approximation of the total number of cases the party and/or attorney (law firm) has had assigned to that judge within the same period. For confidential and/or sealed cases, only the case number is required.

Any party, attorney, or law firm that has filed two or fewer section 170.6 challenges against the challenged judge in the preceding year is exempt from this requirement.

The declaration or attestation must be provided at the time the section 170.6 challenge is made, unless the Court finds good cause to extend the deadline. If extended, the compliant declaration must be filed and served, or the oral attestation made, no later than the end of the next court day. Notice of the challenge and the declaration must be served on all parties as soon as practicable, but no later than five days after the challenge. If all parties are present in court when a written or oral challenge is made, no additional service is required.

Failure to comply with General Order 2026-GEN-010-00 may result in lawful sanctions for violating a court order, but noncompliance does not affect the validity of the challenge itself. Any objection to a section 170.6 challenge must be made within a reasonable time after notice is given.

An updated optional Peremptory Challenge to Judicial Officer Form (XLIT-035) is available [here](#).

About the Superior Court of Los Angeles County

The largest trial court in the nation, the Superior Court of Los Angeles County serves a population of almost 10 million in 36 courthouses with a jurisdiction covering over 4,000 square miles that includes 88 cities, 140 unincorporated areas, and dozens of law enforcement agencies. The Court is steadfast in its mission to serve our community by providing equal access to justice through the fair, timely, and effective resolution of all cases.

For more information on the Court's current programs and services, follow the Court on X ([@LASuperiorCourt](#)), Instagram ([@LASuperiorCourt](#)), Threads ([@LASuperiorCourt](#)), or visit the Court's website, www.LACourt.ca.gov.

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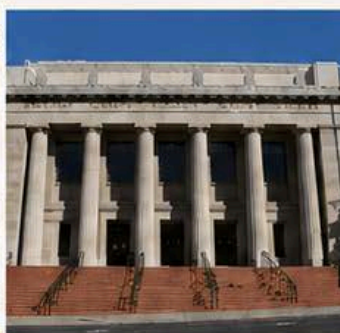
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A New Milestone for LPI: Our First-Ever Virtual Quarterly Education Conference & Board of Governors Meeting



BY DONNA DAY

Conference Committee Chair

LPI Past President 2024-2026

As Conference Committee Chair, it is my privilege to invite you to a landmark moment for Legal Professionals Incorporated. On **Saturday, August 22, 2026**, LPI will host its **very first Virtual Quarterly Education Conference**, paired with the **First Quarterly Board of Governors Meeting**—a full day designed to educate, empower, and connect legal support professionals across California and beyond.

This innovative online format allows us to bring high-quality continuing education directly to you—no travel, no logistics, just meaningful learning and professional growth from wherever you are.

A Dynamic Day of Education: Three Seminars, Three Expert Instructors

Our Day of Education features **three one-hour MCLE- and CCLS-approved seminars**, each led by respected professionals in their fields. As the flyer notes, *"All seminars are approved for California Minimum Continuing Legal Education (MCLE) and CCLS recertification credit in the amount of 1.0 hour each."*

Class 1 — 8:30 a.m. – 9:30 a.m.

Trust Administration After Death: A Roadmap for Trustees

Presented by Gina Leguria, Esq.

This session breaks down the trust administration process into clear, manageable steps. As described in the flyer, it explains *"key deadlines, legal requirements, and best practices"* and offers trustees a practical roadmap for navigating statutory notices, asset identification, debt handling, and distributions with confidence.

Class 2 — 9:45 a.m. – 10:45 a.m.

The Three Bridges of Legal Practice: From Assignment to Outcome

Presented by Lynne Prescott, CCLS

Legal work often falters not from lack of effort, but from breakdowns in communication and execution. This seminar explores *"where work usually breaks down in legal teams, how to ensure it doesn't, and crossing the three critical bridges in every assignment."* It's a must-attend for anyone seeking to strengthen workflow reliability and team performance.

Class 3 — 11:00 a.m. – 12:00 p.m.

Mastering the Schedule of Assets and Debts in Family Law

Presented by Chandra E. Miller, Esq.

Family law professionals will benefit from this deep dive into accurately completing the Schedule of Assets and Debts. The program provides guidance on *"identifying, categorizing, and valuing assets and liabilities,"* along with strategies to avoid common pitfalls and ensure thorough, compliant disclosures.

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Following the seminars, we will break from **12:00 to 1:00 p.m.**, then reconvene for the **LPI First Quarterly Board of Governors Meeting from 1:00 to 4:00 p.m.**

This meeting is an essential opportunity for members to stay informed, observe leadership in action, and engage with the direction of our organization.

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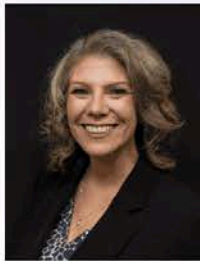
Virtual Day of Education

and First Quarterly Board of Governors Meeting

Saturday, August 22, 2026

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3 Seminars!



Presented by
Gina Leguria, Esq.

Class 1: 8:30 a.m. – 9:30 a.m.

Trust Administration After Death: A Roadmap for Trustees

What exactly happens after the settlor dies—and what must a trustee do first? This webinar breaks down the trust administration process into manageable steps, explaining key deadlines, legal requirements, and best practices. From locating assets and issuing statutory notices to handling debts and making distributions, this session provides trustees with a practical roadmap to stay compliant and confident throughout the process.



Presented by
Lynne Prescott, CCLS

Class 2: 9:45 a.m. – 10:45 a.m.

The Three Bridges of Legal Practice: From Assignment to Outcome

In this profession, we don't struggle because people aren't working hard. We struggle because somewhere between what was intended and what was executed, something gets lost. In this session, we will cover what gets lost and how we fix it, where work usually breaks down in legal teams, how to ensure it doesn't, and crossing the three critical bridges in every assignment.



Presented by
Chandra E. Miller, Esq.

Class 3: 11:00 a.m. – 12:00 p.m.

Mastering the Schedule of Assets and Debts in Family Law

This webinar will guide participants through the process of accurately completing the Schedule of Assets and Debts, a key document in family law cases. Attendees can expect practical instruction on identifying, categorizing, and valuing assets and liabilities, along with best practices for thorough financial disclosures and compliance with court requirements. The session will also highlight common pitfalls to avoid and provide strategies to ensure documents are clear, complete, and effectively prepared for legal proceedings.

REGISTER NOW



Lunch Break: 12:00 p.m. – 1:00 p.m.

LPI First Quarterly Board of Governors Meeting 1 - 4 PM

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LPI's *Off the Record*

with Marci Frazier
Contributing Editor

Every legal professional has a story, a journey, a reason why they chose this profession. Those stories deserve to be heard, and that's what *Off the Record* is all about. In each issue, we'll sit down with leaders, members, educators, volunteers, and legal professionals from throughout Legal Professionals Incorporated for a relaxed, candid conversation that goes beyond résumés and job titles. Together, we'll explore the experiences, challenges, and inspirations that have shaped their careers and their commitment to our profession.



I couldn't think of a better guest to launch this series than the woman leading LPI into its next chapter, newly-elected President Bettina Herrick-Jacobson. After congratulating Bettina on her installation as President, I decided to begin with a question that wasn't on my list.

You've had a little time now to settle into your role as President. What has the experience been like so far? Has anything surprised you? (She laughed.)



The amount of emails that come through is astonishing. The back-and-forth emails, the questions... Donna Day warned me. She said, "The amount of emails..." Well... she wasn't lying.



It was the perfect way to begin our conversation because her answer immediately pulled back the curtain on what many members never see. Becoming President isn't simply standing at a podium during Conference. It's countless emails, conversations, decisions, and a great deal of work happening behind the scenes.

I asked how she manages to balance those responsibilities with a full-time career.



Before becoming President, all of my LPI emails went to my personal email account. Because I work for the court system, I couldn't access my personal email during the day, so I was constantly checking my phone.



That changed this year.



We now have LPI email accounts for the Executive Committee, so I can access my President email while I'm at work. It has made a huge difference because I can stay on top of things instead of waiting until I get home.



Even with that improvement, the work doesn't end when the workday does.



I get up in the morning and check emails. I answer what I can throughout the day, and when I get home, I make dinner, we eat, my husband cleans up... (she laughed) ...and then I go into my office.



When I asked whether that's simply part of serving as President, she nodded.



Everybody on the Executive Committee has a full-time job. Some people have jobs where they can do LPI work during the day, and some of us really can't. You just figure out a way to make it work.



Then she added something that struck me because it applies to so many volunteer leaders, regardless of the organization they serve.



Having the support of your family is super, super important.



As our conversation continued, I found myself becoming less interested in Bettina's title and more interested in the journey that brought her there. So let's go back to the beginning, tell us a little about yourself and your legal career. How did you find the legal profession?



Legal was not something I ever thought about doing. As I mentioned in my acceptance speech when I was installed as President... the legal field found me.



And with that, Bettina began telling the story that ultimately led her not only into the legal profession, but to the presidency of Legal Professionals Incorporated.



The Legal Profession Found Me.



When Bettina told me the legal profession had found her, I knew there had to be a story behind that statement. So, tell me about that. How did the legal profession find you?



It really wasn't something I planned. In 2011, I lost my job. I had been with the company for several years, and when I was let go, I was devastated. I didn't know what I was going to do next.



Rather than letting that setback define her, Bettina decided to approach finding work the same way she would approach a full-time job.



I made finding a job my job. Every day I went to the Auburn Job Center. I'd spend four or five hours there searching for jobs, working on my résumé, and talking with the counselors. After a while, they all knew who I was.



The counselors at the Job Center eventually suggested she take an aptitude assessment to help identify careers that matched her strengths.



When the results came back, one of the careers it suggested was the legal field. I remember thinking, 'Well...that's interesting,' because I had never considered working in law.



The Job Center also introduced her to a program that would change everything.



They told me there was funding available for retraining, and they would pay for me to go to paralegal school. I thought, 'Well, why not?' So I enrolled.



I asked if she had any idea at the time that this decision would ultimately lead her to LPI and, years later, to serving as its President.



Not at all. At that point, I was just trying to start over.



After completing the program, Bettina accepted her first position in a law office. Like so many people entering a new profession, she quickly discovered that classroom learning and real-world experience weren't always the same thing.



I realized there was still so much to learn. School gives you a foundation, but working in a law office is completely different.



Although that first position wasn't a long-term fit, Bettina speaks about it with remarkable gratitude.



The attorney was wonderful. When he realized it wasn't the right fit, he didn't just let me go. He actually helped me look for another position.



Then she shared the part of the story that surprised me most.



He's the one who told me about the Placer County Legal Professionals Association. He suggested I go to one of their meetings because he thought it would be a good way to meet people and make connections.



Listening to Bettina tell that story, I couldn't help but think about how unexpected career paths can be. Losing a job led her to the Auburn Job Center. The Job Center led her to paralegal school. Paralegal school led her to her first legal position. And one attorney's encouragement led her to walk into her very first LPI meeting.

I asked if she remembers that first meeting. She smiled immediately.



Oh, I remember it.



I Found My People.



I wanted to know what she remembered about that first meeting. What was your first impression? Do you remember walking into that room? She smiled immediately.



Oh, yes. I remember it very well. I didn't know anybody. I was brand new to the legal field, and I really didn't know what to expect.



Before long, someone walked over and introduced herself.



Mary Ayala came right up to me. She welcomed me, introduced me to other people, and just made me feel comfortable. She really took me under her wing.



I asked what made that interaction so memorable after all these years.



She didn't have to do that. She could have stayed with the people she already knew, but instead she made sure I wasn't sitting there by myself. She made me feel like I belonged.



Listening to Bettina describe that evening, it wasn't difficult to understand why she still remembers it so clearly. We all remember the people who made us feel welcome when we were new.

I asked whether that first meeting changed how she felt about becoming involved. She didn't hesitate.



"I found my people," she said with a smile.



Those four words stayed with me because they perfectly captured everything she'd been describing.

I asked what kept bringing her back.



Everybody wanted to help. If I had questions, people answered them. They shared their experiences. They encouraged me. They wanted me to succeed.



As Bettina talked about those early years, it became clear that each meeting gave her another opportunity to learn, not only about the legal profession, but about the organization itself.



The more involved I became, the more opportunities I found. There was education. There were committees. There were leadership opportunities. There were so many different ways to become involved.



I asked if she had always imagined herself one day becoming President.



No. That was never my goal.



Then she explained how her leadership journey really began.



I've always thought of myself as more of a support person. If somebody needed help with a project, I'd volunteer. If someone asked me to serve on a committee, I'd say yes. I just liked helping wherever I could.



As Bettina continued talking, it became apparent that there was never a master plan behind her leadership journey.



I never joined thinking someday I'd be President. I just kept saying yes when opportunities came along.



Committee work led to new responsibilities which led to new opportunities to serve. Before long, Bettina found herself learning from leaders she admired and accepting roles she had never imagined for herself. When I asked what has kept her involved all these years, her answer came without hesitation.

BHJ The more you put into LPI, the more you get back. You build friendships. You build professional relationships. You learn from people who've been doing this much longer than you have. Every time I've volunteered, I've gotten so much more back than I ever expected.

LPI is an Opportunity to Serve.

MF By this point in our conversation, one thing had become abundantly clear. Bettina had never viewed LPI as simply another professional organization. For her, it had become a place to learn, to grow, to serve, and perhaps most importantly, to build lasting friendships.

As we continued talking, our conversation naturally shifted from Bettina's journey through LPI to the future of the organization. After hearing how much LPI had given her over the years, I wanted to know what she hopes to give back during her year as President.

That naturally led us to my next question. Bettina, as President, where do you hope to lead LPI over the next year?

BHJ One of my biggest goals is increasing awareness. There are still so many legal professionals who don't know who we are or what we offer. Once people learn about LPI, they realize how valuable it is, but we have to reach them first.

MF I asked what she hopes people will discover once they become involved.

BHJ We have incredible educational opportunities. We have networking. We have certification programs. We have scholarships. We have leadership opportunities. There really is something here for everyone. If people don't know we're here, they'll never have the chance to benefit from everything LPI offers.

MF Education is clearly something Bettina cares deeply about, so I asked why it continues to be such an important part of LPI's mission.

BHJ The legal profession is constantly changing. Laws change. Technology changes. Procedures change. Education is one of the things that makes LPI so valuable because it helps legal professionals stay current throughout their careers.

MF Then she laughed.

BHJ I've been doing this for years, and I'm still learning.

MF Our conversation turned to one of the initiatives she's especially excited about. I asked her to tell me about the new *Academic and Strategic Alliance Liaison* position.

BHJ We're building stronger relationships with schools and educational programs because today's students are tomorrow's members. If we can introduce students to LPI before they begin their careers, they'll already know they have a professional community waiting for them. They'll have people they can learn from, ask questions of, and lean on as they begin their careers.



Because technology has become such an important part of every legal professional's workday, I also wanted to hear Bettina's thoughts on artificial intelligence and the rapid changes taking place throughout the profession.



Technology isn't the future anymore. It's the present.



She doesn't see those changes as something to fear.



We need to understand these tools. We need to learn how to use them effectively because they're becoming part of our profession. LPI has an opportunity to help educate our members so they can embrace technology instead of being intimidated by it.



Before moving to my final questions, I asked Bettina if there was one message she hoped every member would remember after her year as President. She didn't hesitate.



LPI is an opportunity. It's an opportunity to learn. It's an opportunity to build friendships. It's an opportunity to develop professionally. Most of all, it's an opportunity to serve.

Off the Record: A Few Final Thoughts



Before we wrapped up our conversation, I wanted to ask Bettina a few questions that would leave our readers with something they could take with them. Throughout our interview, she had talked about the people who encouraged her, the opportunities that changed her career, and the importance of continuing to learn. I was curious what advice she would give to someone who is just beginning that same journey. What would you say to someone who's thinking about joining LPI?



I would tell them to join. LPI is a great place to build connections, grow professionally, and stay engaged with people who care about improving the legal community. You'll learn from people with different backgrounds and experiences, and you'll gain perspectives you may never have considered. It's a support system, not just a membership. You're not doing it alone. There are opportunities to participate, collaborate, and encourage one another along the way.



She paused for a moment before adding the thought that has come up more than once during our conversation.



If you want to be part of something bigger, this is it. The impact of LPI is built through participation. I would say, join LPI if you want to grow, connect, and contribute. The more you put into it, the more you'll get out of it.



Because continuing education has always been such an important part of LPI's mission, I also asked Bettina what advice she would give someone who is considering earning the California Certified Legal Secretary (CCLS®) credential.



Even if you already do your job really, really well," she said, "being a CCLS® requires a broader understanding of what's beyond the daily tasks you perform.



Rather than simply encouraging people to sign up for the exam, Bettina offered practical advice.



Talk to people who already have the certification. Ask them what it takes to prepare, what resources helped them, and what they found most challenging. LPI has a study program specifically designed to help people prepare for the CCLS® exam. Take advantage of those resources.



She also encouraged members to think strategically about continuing education.



If you're not ready to take the CCLS® exam, that's okay. Take our Beginning Legal Secretarial Training Course, our Intermediate Course, our Advanced Course, or one of our other multi-week courses. You're learning pieces of what you'll eventually need for the certification, and you're growing professionally along the way.



As we reached the end of our conversation, I asked Bettina one last question. If someone asked you to describe LPI in just a few words, what would you tell them? Her answer came without hesitation.



LPI is an opportunity. It's an opportunity to learn. It's an opportunity to build friendships. It's an opportunity to develop professionally. Most of all, it's an opportunity to serve.



I couldn't think of a more fitting way to end our conversation. When we first began talking, Bettina told me that the legal profession had found her almost by accident. What she couldn't have known at the time was that the unexpected path she reluctantly stepped onto would eventually lead her to a profession she loves, an organization she treasures, and a community she now has the privilege of leading.

As I thanked Bettina for spending the afternoon with me, I found myself reflecting on something she had said much earlier in our conversation. She believed that the legal profession had found her.

After hearing her story, I think many of us would say that LPI found exactly the leader it needed.



MARCI FRAZIER
Contributing Editor
The Legal Professional®

With over 35 years of experience in the legal field, Marci Frazier has gained extensive knowledge and skills working with various legal practices. Originally from Chicago, Marci is currently a Legal Practice Assistant at Best Best & Krieger LLP, where she continues to contribute to her team. She has been a member of the Sacramento Legal Professionals Association since 2015 holding various leadership positions throughout the years. Her dedication to her work and attention to detail have made her a reliable resource within her firm.

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BULLETPROOF SERVICE OF PROCESS:

What Paralegals and Legal Secretaries Need to Know Before the **SPARE Act** Takes Effect



By **Jonathan Shisler**, CEO, A2Z Attorney Service



Service of process is one of the easiest tasks to get wrong — and one of the most expensive when you do. A motion to quash, a default set aside, an embarrassed firm, a delayed case: these are the real-world consequences of service that fails to meet legal standards. For paralegals and legal secretaries, who coordinate service orders, track deadlines, log attempts, and file proofs, understanding what defensible service actually requires is no longer optional.

AB 747 — the Service of Process Accountability, Reform, and Equity (SPARE) Act, signed October 10, 2025, and taking effect January 1, 2027 — expands defendants' ability to challenge service based on a lack of proper diligence. The new law allows parties to rely on objective deficiencies in the proof of service as grounds to attack it — even, potentially, for judgments already on the books before 2027. The argument that the new standards apply retroactively is already being raised.

Why Service Matters More Than You Think

Most people in legal support know service of process is important. Fewer recognize just how many downstream consequences hinge on it. When service is defective, it can unravel a default

that took months to obtain, expose a client to sanctions, or require a case to be re-filed entirely.

Service is not a task — it is a liability point. Many process servers focus only on getting documents served. What actually matters is making service legally defensible: protecting your default, your judgment, your writ, and your firm's credibility. The takeaway: clean service has always mattered. Starting in 2027, the evidentiary bar for defending it will be higher.

Setting Your Process Server Up for Success

A significant portion of service failures begin before the server ever leaves the office. What paralegals and legal secretaries include — or fail to include — on an order request directly determines whether service can be completed correctly.

A complete service order should specify:

- The party or parties to be served, with specific instructions for each if there are multiple
- For business entities, the names and titles of individuals authorized to accept service (per CCP § 416.10)
- The address or addresses to be attempted, and the priority order if more than one exists

- Timeline expectations — routine, rush, or daily attempts
- Any special instructions or known details that would help the server locate or identify the subject

Two items that are frequently overlooked:

- A list of the specific documents to be served — this protects against missing documents and keeps everyone accountable
- Which attorney of record should appear on the proof of service when multiple attorneys are involved

Do not wait until the last minute. Get documents out for service as soon as they are ready. You never know what issues may arise.

The Three Elements Every Valid Service Must Satisfy

Regardless of the method used, every service of process must accomplish three things:

- Identify the correct party
- Notify them of the action
- Deliver the documents

The most common point of failure is what might be called “capacity notice errors” — situations where the proof of service leaves blank the capacity in which a person was served, improperly designates an entity, uses the wrong statutory authority, or fails to match the description in the complaint. Other risk factors include serving the wrong entity and serving an improper party. These are not technical quibbles. They are the grounds on which motions to quash are granted.

Substituted Service: More Requirements Than You May Realize

Substituted service — leaving documents with another person at a defendant’s home or workplace — is widely used but frequently done incorrectly. It is not simply “leave it and go.”

Under current law, substituted service requires reasonable diligence, time variation between attempts, a follow-up mailing, and completion of all steps within a 10-day window. Local rules, fast-track service timelines (particularly in unlawful detainer matters), and same-day mailing requirements add further complexity that varies by county. Invalid substituted service can cost

months — or the case in its entirety.

Under the SPARE Act, the standard for “reasonable diligence” will be codified as three attempts, on three different days, at three different times — the 3×3×3 rule. This takes effect January 1, 2027.

Unlawful Detainer: A High-Risk Area

Unlawful detainer proceedings are among the most technically demanding service situations. Under CCP § 415.46, posting and mailing is required for “all other occupants” in a residential UD, and a Prejudgment Claim of Right to Possession must be included with every service.

For unknown occupants, the server must affirmatively inquire whether there are additional adult occupants — the server cannot simply ignore the possibility. Failure at any of these steps can delay an eviction, require complete re-service, and protect unnamed occupants from the judgment.

Beginning January 1, 2027, UD complaints will also be required to state the method of service of the termination notice, along with the date, time, and location of that service, and to attach the notice and lease as exhibits.

The SPARE Act: What Changes on January 1, 2027

Here is a summary of the major changes under AB 747:

- Public process server registry: County clerks will maintain a publicly available registry of registered process servers and issue ID cards.
- 3×3×3 diligence standard: For substituted service and UD posting, at least three good-faith attempts on three different days at three different times will be required.
- Photo and GPS documentation: New proof of service requirements will mandate one or more photos of the service site for each attempted or effected service. Each photo must include a readable date, time, and GPS stamp. Exceptions exist for safety concerns, with a detailed narrative required.
- New mailing options: The follow-up mailing after substituted service may be sent via

USPS First-Class, Priority (with tracking), or Certified Mail with return receipt.

- New CCP § 473.2: A party who was not lawfully served may move to vacate a default or default judgment. The moving party must offer evidence that service was defective; the burden then shifts to the plaintiff to prove lawful service by a preponderance of the evidence. The court must hold an evidentiary hearing with oral testimony if either party requests it.

Documentation: If It Is Not Written, It Did Not Happen

A proof of service must be able to stand on its own as if it were testimony — because under the new § 473.2 framework, it may have to do exactly that. “No answer” is not a satisfactory result. True diligence is documented, objective, and adds new detail with each attempt.

Strong documentation includes:

- Detailed attempt descriptions — what was observed, who was spoken to, what the environment looked like
- Time-stamped entries for every attempt
- Identifying details: physical description of anyone contacted, relevant environmental context
- Photographs of attempts and postings — required by law starting January 1, 2027

What Paralegals and Legal Secretaries Can Do Right Now

The SPARE Act does not take effect until January 1, 2027, but preparation should begin now:

- Review your service order templates. Paralegals and legal secretaries are often the ones building or sending these requests — ensure they capture all required details: documents to be served, authorized recipients for entities, timeline instructions, and designated counsel for the proof of service.
- Know your process server’s documentation practices. Ask whether they photograph attempts, how they handle evasion, and how they document diligence. Legal secretaries who log attempts and calendar follow-up deadlines should understand what the server

is expected to provide — and flag it when the return is incomplete. Their standards become your firm’s standards in court.

- Flag UD matters for heightened attention. Unlawful detainer service has always required strict compliance; the SPARE Act raises the stakes further. Legal secretaries handling UD intake should know the new complaint requirements taking effect in 2027 — method, date, time, and location of notice service must be stated, with the notice and lease attached.
- Understand CCP § 473.2. Starting in 2027, defective service — even on an older matter — could become the basis for a motion to vacate a default judgment.
- Communicate timelines clearly and early. Process servers need lead time. Daily attempts to meet a five-day window require that instruction from the outset, not the day before the deadline.

The Bottom Line

When service is done correctly, the benefits are concrete: fewer motions to quash, fewer continuances, stronger defaults, enforceable subpoenas, and cases that stay on track. When service fails, everything else in the matter becomes harder.

The SPARE Act is a signal that California takes process server accountability seriously. For paralegals and legal secretaries, it is an opportunity to lead—by building complete service orders, tracking attempts rigorously, demanding proper documentation from servers, and ensuring that every proof of service is as defensible as the work that precedes and follows it.



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Jonathan Shisler is the founder and CEO of A2Z Attorney Service, a technology-driven attorney support firm serving law firms nationwide. A process server since 2008, he brings nearly two decades of industry experience and a practical, field-tested perspective to legal support operations. Jonathan has served on the CALSPro Board of Directors, is the continuing education committee co-chair, and regularly instructs at education seminars focused on improving professionalism, accuracy, and best practices within the legal support industry.

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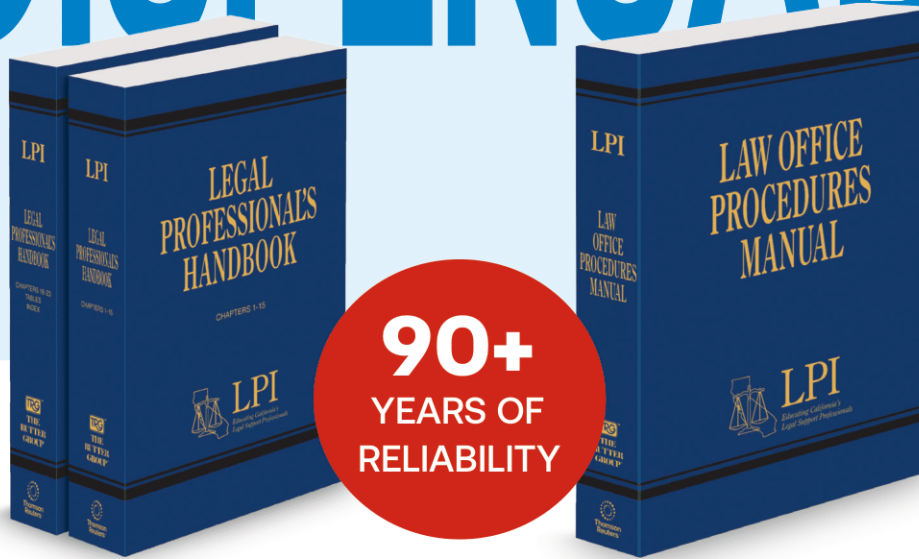
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The Most Wonderful Time of the Year Becomes an Unforgettable Reality

LPI's 92nd Annual Educational Conference

May 14–17, 2026 | Hilton Sacramento Arden West | Sacramento, California

Hosted by Sacramento Legal Professionals Association

When Legal Professionals Incorporated members gathered in Sacramento for the 92nd Annual Educational Conference, they quickly discovered that this year's theme —**"The Most Wonderful Time of the Year"**—was far more than a catchy slogan. From the moment attendees arrived at the Hilton Sacramento Arden West until the final farewells at Sunday's Installation Brunch, the conference was filled with laughter, learning, friendship, and countless moments that reminded everyone why Annual Conference remains the highlight of the LPI year.

Hosted by the Sacramento Legal Professionals Association, the conference welcomed members from across California for four days of outstanding education, professional networking, and holiday-inspired fun. Every detail reflected months of planning by conference co-chairs Crystal Rivera and Brenda Johnson, CCLS, whose creativity transformed the hotel into a festive celebration that perfectly captured the spirit of the season.

Of course, education remained at the heart of the conference. Attendees participated in informative seminars, the Parliamentary Workshop, and engaging discussions that provided valuable knowledge they could immediately take back to their offices and local associations. Throughout the weekend, members also

explored the exhibitor gallery, visited with vendors, browsed the silent auction, and eagerly checked to see if their raffle tickets were the next lucky winners.

The social events truly brought the holiday theme to life. Friday's Roundtable Luncheon offered members an opportunity to reconnect with longtime friends while warmly welcoming first-time attendees into the LPI family. Conversations flowed easily as colleagues shared ideas, exchanged stories, and renewed friendships that span years—and often decades.

Friday evening's "Reindeer Games" quickly became one of the weekend's highlights. Dressed in festive holiday pajamas, attendees embraced their competitive sides during an evening filled with games, laughter, cheering, and plenty of good-natured rivalry. The mashed potato bar proved to be a crowd favorite, and by the end of the evening, everyone had accumulated a collection of new memories—and probably a few new inside jokes—that will be talked about for years to come.

Saturday's CCLS Luncheon provided a meaningful pause in the festivities as LPI celebrated its newest California Certified Legal Secretaries. The "Snow Angels" theme perfectly reflected the pride and accomplishment of these dedicated professionals as family, friends, and fellow

members applauded their hard work and commitment to excellence. LPI's newest CCLSs include:

September 2025

Melisa Bamberger, CCLS
Non-Member

Cheryl Caldwell, CCLS
LPI Member at Large

Mike Lewis, CCLS
San Francisco Legal Professionals Association

Jennifer Montane-Falgout, CCLS
Contra Costa County Legal Professionals Association

Antonia Valencia, CCLS
Los Angeles Legal Secretaries Association

March 2026

Camie Bowling, CCLS
Santa Clara County Legal Professionals Association

Maria Cabrera, CCLS
Non-Member

Jennifer Husar, CCLS
Non-Member

Christie Kaelber, CCLS
Sacramento Legal Professionals Association

Sally Mendez, CCLS
San Francisco Legal Professionals Association

Rachel Sarge, CCLS
Sacramento Legal Professionals Association

Gabriela Pino, CCLS
Non-Member

Saturday evening brought elegance and excitement during "A Starlit Holiday: Honoring the Stars of LPI." Members embraced the holiday glamour theme with sparkling attire that transformed the banquet into a dazzling celebration. The evening honored outstanding volunteers and leaders whose dedication continues to strengthen LPI, while heartfelt applause, warm smiles, and joyful reunions reminded everyone that recognition is most meaningful when shared among friends.

Another conference favorite was the expanded Legacy Project Display Room. Members enjoyed stepping back through the rich history of Legal Secretaries Incorporated and Legal Professionals Incorporated while admiring

memorabilia spanning generations. Vintage office attire added another layer of fun as attendees represented decades from the 1930s through the 1980s, creating wonderful photo opportunities and plenty of laughter. Equally meaningful was the opportunity to contribute memorabilia to the LPI Time Capsule, preserving today's history to be opened during the organization's 100th Annual Conference in 2034.

The weekend concluded with the beautiful "Winter Wonderland" Installation Brunch, where members celebrated new leadership while reflecting on another successful conference. Although no one was quite ready for the festivities to end, attendees departed Sacramento feeling re-energized, inspired, and grateful for the friendships and professional connections that make LPI so special.

More than the educational sessions, the awards, or the holiday decorations, this conference served as a reminder of what makes Legal Professionals Incorporated unique: a community of professionals who genuinely enjoy learning together, supporting one another, and celebrating each other's successes.

As members headed home carrying raffle prizes, photographs, and cherished memories, one thing was clear—LPI's 92nd Annual Educational Conference truly lived up to its theme. It really was **the most wonderful time of the year**.

Thank You to Our Sponsors!

LPI's 92nd Annual Educational Conference is made possible through the generous support of our sponsors. We are proud to have so many wonderful sponsors joining us this year, and we extend our deepest gratitude to each of them for their commitment to our profession and their investment in this incredible community. Please take a moment to connect with our sponsors — their support makes events like this possible.

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LPI's 92nd Annual Educational Conference

EXIBITORS

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Sacramento Legal Professionals Association

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Corene Brooks
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Ron Ackland
Marketing & Conference Treasurer
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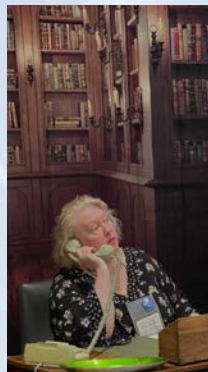
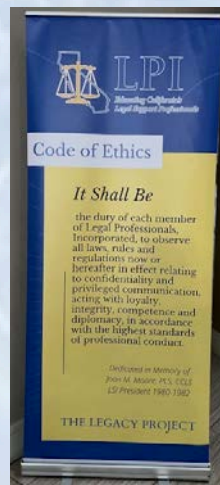
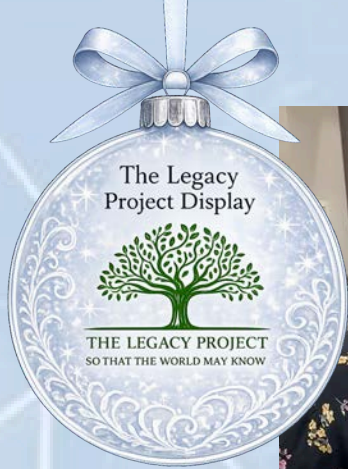
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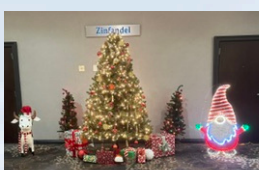
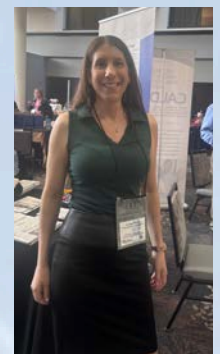
Mary Taylor / Dawn Willis
Door Prize / Silent Auction

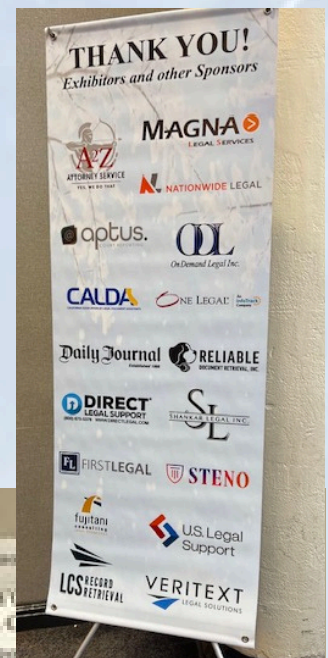
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Legacy Project, CCLS Luncheon,
Banquet, Official Program

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The Most Wonderful Time of the Year!

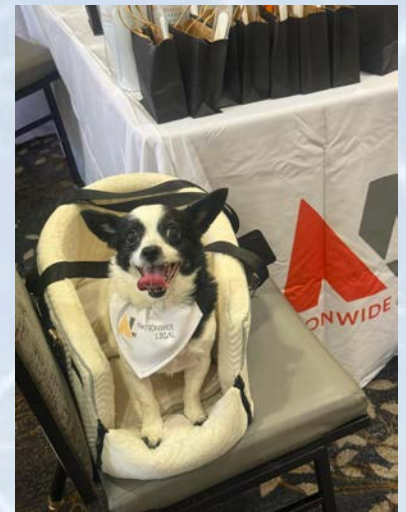
SPECIAL SESSION

Tami Dunning, PRP
Professional Registered Parliamentarian
U.S. Army Veteran
Open Meeting Expert

Friday, May 15, 2026
9:00 – 11:00 AM

This session is included with conference registration.

LPPI's 92nd Annual Educational Conference,
Meeting of Delegates, and Board of Governors Meeting









My CCLS Journey!



Greetings to my fellow Legal Professional Incorporated (LPI) community. I still can't quite believe it—but I passed the California Certified Legal Secretary (CCLS) exam!

It was not an easy journey. It has been over 20 years since I first took the CCLS exam and failed the entire test, which meant I had to start from scratch. I was a participant in LPI's CCLS Study Group. I learned so much after being away from college, which seems like it was so long ago. While I prepared to retake it back then, I realized I needed to focus on better ways to practice and study. Although I had great mentors, I was still new to litigation. Looking back, I was just a "baby" in the profession, beginning my journey toward becoming an experienced Legal Secretary. **The study group at the time included flash cards and what seemed to be a 3-month course. It felt like an eternity at the time, but it set the foundation for me. Many of the lessons I learned from this study group are still in my mind and set in and are part of my learning.**

It was challenging to learn how to be a student again after so many years. Balancing a study schedule with the demands of raising young children and managing family life was not easy, especially while navigating the long Bay Area commutes many of us know all too well.

Now, full disclosure to everyone - I didn't jump back into the exam immediately. Instead, I spent the last decade focusing on growth—both in my legal career and my personal life—searching for ways to continue learning so that I might eventually try again.

I did not give up. I continued learning by not only participating in several study groups over the years but also attending many workshops through San Francisco Legal Professionals Association, (SFLPA) and LPI. These events all contributed to my continued education and helped keep me informed and up-to-date changes in the legal community. (Which is constantly changing and evolving.)

By Sally Mendez, CCLS

Vice President, San Francisco Legal Professionals Association
Legal Assistant at O'Hagan Meyer

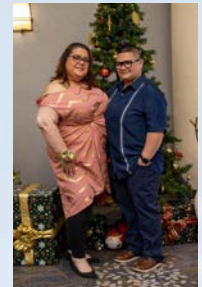
During those ten years, I retook the exam and slowly improved: first needing to retake three sections, then two, and finally, just one. However, life brought personal challenges that drained my mental and emotional capacity. I didn't feel strong enough to continue, so I stepped away to focus on healing. I had gone so far on my journey, but the mental reset was what I needed. Sometimes you must be the best advocate for yourself, as no one knows you best than yourself.

This past fall, I decided I needed a change and professional growth. I left a firm which I was not very happy with, and I started to feel stagnant and was itching for growth. I joined a new law firm that was incredibly supportive of continuing legal education. My supervisor gave me the final push I needed to attempt the exam once more. **It was a goal my supervisor and I had established early on while joining the firm. It would be a great example for other experienced secretaries and legal assistants to see how important it is to become a CCLS. I am glad to be part of this prestigious group.**

Here I was 10 years later, the "new" me—the healed me—decided to take on the CCLS exam, and I passed on my first try this time around!

This success has boosted my confidence, and I am eager to mentor others. I want to show them that this is not a race or a competition, but a personal journey. I had so many people cheering for me that I even surprised myself by passing. While I was prepared for bad news, I received the best news instead.

I am here to encourage you: You can do it! It isn't a race, and it isn't a competition. Do it for yourself, you deserve it!







Mike Lewis, CCLS **2025-2026 Rising Star Award**

In 2017, Former President Jennifer L. Page, CCLS, initiated a tradition of awarding the Rising Star Award to an LPI member demonstrating significant potential to contribute substantially to LPI. This person embodies enthusiasm, dedication, and a commitment to excellence in their role. This year's winner exemplifies these qualities and more.

This year's recipient of the Rising Star Award first came to my attention at a local association meeting hosted at a law firm. It didn't take long to recognize a clear path toward leadership. This individual not only embraces LPI's commitment to education, but truly leads by example—sharing a genuine enthusiasm for LPI with colleagues at every level of the profession.

When I was invited to speak about what LPI can offer legal support professionals, it was immediately evident that this passion had already made an impact throughout the entire firm. After accepting an invitation to serve on the Education Council, it became even more clear that leadership within LPI was a natural next step. The energy, dedication, and perspective brought to the table have been truly appreciated.

This individual is consistently positive, approachable, and the very definition of professionalism. I often see this Rising Star in passing in my own building, and I've had the privilege of presenting LPI to the firm's leadership alongside such a strong advocate. There is no doubt that the future will include continued growth within LPI—serving on the Leadership Team, presenting alongside our instructors, and perhaps one day even leading this organization.

Please join me in congratulating this year's Rising Star Award, Education Council Member, Programs Chair and member of San Francisco Legal Professionals Association, Mike Lewis, CCLS!



Diana E. Estabrook, PLS

»»» LSI Past President 1984-1986 «««

2025-2026 Legacy Award

In 2022, our Past President, Lynne Prescott, CCLS, established the tradition of presenting the LPI Legacy Award—an honor recognizing a member whose lifetime achievements have left a lasting mark on our organization and the legal profession, and who truly embodies the spirit of paying it forward and giving back. This year, it became clear that more than one individual captured the full meaning of that legacy. We are fortunate to have more than one member whose contributions and dedication have shaped who we are today. For that reason, I am especially proud to present the LPI Legacy Award to not one, but two truly deserving recipients.

The first recipient of this year's LPI Legacy Award holds a truly special place in my heart. Having grown up within LPI, I've had the privilege of witnessing many individuals lead and shape this organization in meaningful ways. Among them, this honoree stands out—not only for her years of dedicated leadership, but for the lasting impact she continues to make today.

Her service to LPI extends far beyond her time in formal leadership roles. She has given generously of her time, energy, and expertise at both the state and local levels, demonstrating an unwavering commitment to the strength and future of this organization. It is rare to see someone continue to contribute with such consistency and passion long after their official tenure has ended.

On a personal level, I hold immense respect for this recipient. Over the years, I've been fortunate to develop a friendship with her that I know will last a lifetime. She has been a mentor in the truest sense—teaching not only what it means to be an effective leader, but also emphasizing the importance of listening, learning, and striving to make a meaningful impact on others and on LPI as a whole.

Too often, when individuals feel they have given all they can, they step back and gradually disengage. That is simply not the case here. This honoree remains actively involved, faithfully attending membership and board meetings in her role as Parliamentarian, participating in conferences, and offering steadfast support to members across the organization. Her presence continues to strengthen LPI in countless ways.

I am proud to have known her for so many years. Within her local association, she is affectionately known as the “Picky Parliamentarian”—a title that speaks both to her attention to detail and her dedication to doing things the right way. Many of you also know her from our Annual Conferences, where she brings us together in a special way by leading our Closing Song.

It is my distinct honor to present this year's LPI Legacy Award to Diana E. Estabrook, LSI Past President (1984–1986) and current Parliamentarian of the San Diego Legal Secretaries Association.



Lynne Prescott, CCLS

»»» LPI Past President 2020-2022 «««

2025-2026 Legacy Award

And finally, our second recipient of this year's LPI Legacy Award is someone whose impact on this organization is both profound and enduring. She has given back to LPI many times over, serving as a constant mentor and a trusted source of guidance. What sets her apart is not only the depth of her knowledge, but the generosity with which she shares it—always offering her time and wisdom freely, and never expecting anything in return.

On a personal note, she holds a very special place in my heart. Throughout my time on the Executive Committee, she has been a steady and unwavering source of support. Her encouragement, insight, and perspective have meant more to me than I can fully express. She has an incredible ability to uplift those around her while also challenging them to grow.

What continues to amaze me is her tireless dedication to the legal community. She gives of herself again and again, ensuring that others have access to the knowledge, tools, and confidence they need to succeed. She exemplifies what it means to be a true leader—not only through her accomplishments, but through her authenticity. She has shown me that leadership is not about changing who you are, but about strengthening your voice and remaining true to your values.

There are many styles of leadership, and it has been a privilege to discover how closely ours align. We often find ourselves thinking alike—so much so that we've been known to finish each other's sentences, followed by her familiar and lighthearted remark, "OMG—get out of my head." It's a reflection of the genuine connection and mutual respect we share.

One of the most meaningful reasons for selecting this recipient is her deeply rooted commitment to the legacy of LPI. She has not only upheld its values, but has actively shaped and strengthened them for future generations. In fact, it is especially fitting that the very person who helped create this award is also among those most deserving of it.

For these reasons, and so many more, it is my great honor to ask you to join me in congratulating our Past President, instructor extraordinaire, and my mentor and dear friend, Lynne Prescott, CCLS, of the Sacramento Legal Professionals Association!



Dawn Forgeur, CCLS **2025-2026 President's Award**

The President's Award was first given by LSI President Suzanne Allen in 1979 to recognize a member who, during the previous year, had made a significant contribution, in the president's opinion alone, to the president, to the organization, or both. The criteria were to give the award to someone other than an elected officer since the elected officers' obligations are mandated by virtue of their office.

Because of this individual's extraordinary dedication and selfless contributions to LPI—and the unwavering support not only of me, but of the entire Leadership Team—selecting this year's recipient was an easy decision. This person devotes an incredible amount of time and energy to our organization, and we have grown accustomed to the exceptional level of support that is consistently provided.

Tonight, I want to recognize that commitment, express my gratitude for the hard work behind it, and celebrate the many successes of this past year. Throughout my presidency, this person has truly been my right hand—guiding me through challenges, offering thoughtful counsel when I needed it most, and serving as a sounding board for ideas in even the most complex situations. Every time there was a need, a helping hand was lent to me. That support has been invaluable.

This individual does not simply hold one leadership role; she supports nearly every aspect of our organization and is instrumental in driving LPI forward. She has a familiar and welcoming presence at Conference, someone each of us recognizes and relies upon. While many of us wear multiple hats, this person serves at both the State and Local levels, providing full-circle support to LPI in everything she does.

Time and again, she rises to every challenge, dedicating countless hours to the development, education, technology, and marketing efforts of LPI. I am continually amazed by how generously she gives her time and talents to all of us. Quite honestly, I could not fulfill my role as President without her constant support, communication, and steadiness.

When I joined the Executive Committee years ago, I promised myself that I would always remain true to who I am. What has stood out to me is how calm, grounded, and composed this person remains—even when several of us arrive with urgent, “must-be-done-now” requests. From ensuring our education classes run smoothly, supporting the marketing table, promoting our social media platforms, and making sure every conference seamlessly supports our Zoom participants, she has been integral to the success of our hybrid meetings and have made it all appear effortless.

It is with great pleasure that I present the LPI President's Award to someone who has truly gone above and beyond, making a lasting impact on LPI and on me along this journey. Please join me in offering a heartfelt congratulations to this year's President's Award recipient—Technology Chair, Education Council Member, Marketing Committee Member, and President of Sacramento Legal Professionals Association—DAWN FORGEUR, CCLS.





Ten years ago, I walked onto this Executive Committee as an outsider. A man among almost a century of remarkable women. If I'm being honest, there were times when I wasn't sure I belonged in a room full of such extraordinary people.



Rod Cardinale, Jr.
2024-2026 Executive Advisor
LPI Past President 2022-2024

What followed has been among the greatest honors of my life — not the titles, not the firsts, though I do hold them with pride. What I will carry forever is something no title or personal achievement could capture. The late nights working through hard problems together. The friendships I never expected. The realization that the work we do here genuinely matters — and the privilege of watching the selfless leaders of this great organization show up, year after year, for the people they serve.

I am proud to stand here as the first man ever elected to LSI/LPI office, and the first to lead it as President. But please hear me when I say this: I did not blaze a trail. I was welcomed onto one — a trail laid down by extraordinary women across nearly one hundred years of service, sacrifice, and leadership. I simply had the privilege of walking hand in hand with all of you. Serving on this Executive Committee for the past ten years has been one of the most meaningful chapters of my professional life. I hope I left a lasting imprint on LPI — and that I am remembered for the integrity, dedication, and heart I brought to everything I did here.

To every person who believed in me, challenged me, and stood beside me — you gave me ten years I would not trade for anything.

I leave today not with sadness, but with a full and grateful heart — proud of what we accomplished, and forever part of the LPI Family.

Thank you — from the very bottom of my heart — for the privilege of serving this great organization.

Rodney Angelo Cardinale, Jr.

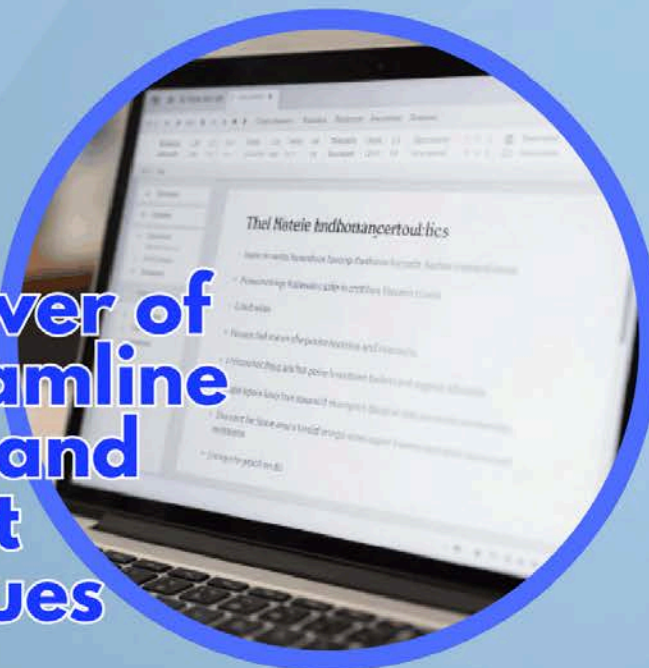






Conference Committee
Celebration Dinner

Unlocking the Power of Word Styles: Streamline Your Workflow and Troubleshoot Formatting Issues



Presented by: **June Hunter**

LPI Member - \$25
Non-Member - \$55

Tuesday, September 1, 2026
12:00 p.m. - 1:00 p.m.

Discover the time-saving potential of Word's Styles feature in this in-depth webinar. Designed for legal professionals and office users alike, this session will explore the full range of capabilities within Word, including built-in themes, how to identify, create, and modify styles, and troubleshooting common formatting issues. Learn how to apply consistent formatting across your documents, improve document navigation, and save valuable time by automating repetitive tasks. Whether you're preparing legal briefs, reports, or correspondence, this webinar will help you take full advantage of Word's powerful styling tools to enhance your productivity and ensure professional results every time.



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:
Training@LegalProfessionalsInc.org

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This webinar is also approved for 1.0 hour of CCLS credit.



► RECONNECTING A LEGACY... - CONTINUED FROM PAGE 1

collaboration, and continuing education remains as important as ever.

Re-establishing this local association can provide:

Professional Development Opportunities

Educational programs, workshops, certification support, and continuing education designed to meet the demands of today's legal environment.

Networking & Career Growth

A welcoming space to connect, collaborate, and advance professionally within the Beverly Hills and Century City legal communities.

Mentorship & Leadership

Guidance and encouragement for newer professionals, along with leadership opportunities for experienced members seeking to give back to the profession.

Community & Support

An inclusive environment where members can exchange knowledge, celebrate achievements, foster friendships, and support one another through the evolving challenges of the legal field.

Honoring Our Legacy — Building Our Future

The legacy of BHCCLSA is one of professionalism, dedication, leadership, and camaraderie. Those who came before us built a strong and respected foundation—one that deserves to be rediscovered, revitalized, and carried forward for future generations of legal professionals.

This effort is about more than relaunching meetings. It is about rebuilding a professional community that reflects the excellence, resilience, and evolving role of legal professionals today.

Your Voice Matters

Whether you previously served as an officer, were a long-time member, recently participated, or are simply interested in becoming involved, your voice and

participation are essential.

We are currently gathering interest, ideas, and founding participants to help:

- Re-establish chapter leadership
- Plan inaugural meetings and networking events
- Reconnect with Legal Professionals Incorporated
- Develop educational and mentorship opportunities
- Shape the future direction of the association

Join Us in this Next Chapter

This is your invitation to become part of something meaningful—to reconnect with colleagues, contribute your experience, and help build a vibrant professional community once again.

If you are a past or present member—or know someone who may be interested—we encourage you to reach out and express your interest in participating.

Together, we can restore BHCCLSA, celebrate the legal profession, and create a lasting impact for years to come.

Contact Information

Donna Day

LPI Executive Advisor 2026-2028

ExecutiveAdvisor@LegalProfessionalsInc.org

Please reach out to express your interest, share your memories, or learn more about participating in the revitalization of the Beverly Hills Century City Legal Secretaries Association.

Together, we can honor our past—and build a stronger future.



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.



Looking Beyond the Case Timeline: What Is Actually Happening That I Can't See?

By Lynne Prescott, CCLS

Contributing Editor

There comes a point in every legal professional's career when the work begins to look different. The deadlines haven't changed. The Rules of Court haven't changed. The Code of Civil Procedure hasn't changed. What changes is how **you** see the case.



Early in our careers, we see assignments. Prepare the subpoena. Calendar the hearing. Draft the notice. Organize the exhibits. File the motion. Each task feels independent, complete unto itself. Then, almost without realizing it, something remarkable happens. We stop seeing individual assignments and begin seeing relationships. We begin asking a different question:

What is actually happening here that I can't see?

In my experience, that single question marks the transition from simply performing litigation tasks to truly understanding litigation. It is the moment when a legal professional begins thinking like a case manager rather than a task manager.

The Timeline We Learn

If you were asked to draw the life of a lawsuit, you would probably sketch something like this:

Complaint.

Answer.

Discovery.

Depositions.

Motion practice.

Expert discovery.

Settlement.

Trial.

It's logical. It's orderly. It's also incomplete.

That timeline serves an important purpose. It teaches us the major milestones in a lawsuit and helps us understand the sequence of litigation. Every legal professional needs that foundational knowledge.

But here's the challenge. The timeline only tells us **what** happens. It doesn't tell us **everything else that must happen to make those events possible**.

The timeline isn't lying. It's simply showing us the case from 30,000 feet.

The real work — the work that determines whether a case succeeds or struggles — is happening below the surface.

Beneath the Surface

Once you begin looking beneath the timeline, litigation suddenly becomes far more dynamic. Discovery isn't simply "discovery."

While written discovery is being drafted, depositions are being scheduled. While depositions are underway, experts may already be reviewing records. While a mediation date is being selected, dispositive motions may be under consideration. Trial notebooks might quietly be taking shape months before anyone says the words "trial preparation."

None of these activities exist in isolation. They overlap. They influence one another. They compete for time and attention.

The experienced legal professional doesn't see one timeline. They see many timelines unfolding simultaneously.

There is a pleading track.

A discovery track.

A law and motion track.

An expert track.

An ADR track.

A trial preparation track.

A client communication track.

An evidence management track.

Each moves independently.

Each affects the others.

When one shifts, every other track must adjust. That is why litigation often feels less like following a road map and more like conducting an orchestra. Every section has its own music, and someone still has to make sure it all comes together at precisely the right moment.

Seeing the Invisible Work

Consider a deposition. To someone new to litigation,

the calendar might simply read:

September 10 – Plaintiff's Deposition

An experienced legal professional sees something entirely different.

Has the notice been served? Have objections been evaluated? Have records been received? Have exhibits been selected? Does the attorney need a chronology? Has the witness outline been prepared? Should impeachment materials be assembled? Will this testimony affect a pending motion? Could the testimony change settlement strategy? Will follow-up discovery become necessary?

The deposition itself lasts one day; however, preparing for it may take weeks. The work it generates may continue for months.

The deposition isn't the event. It's one chapter in a much larger story.

I've Always Wanted to Take Things Apart

I've always been the kind of person who wanted to understand how things worked.

As a child, I was fascinated by what happened beneath the surface. If you handed me a telephone, I didn't simply want to know that it worked. I wanted to know what each part did. How did this piece connect to that one? What purpose did each component serve? What would happen if one part was missing? Would the whole thing still function?

That same curiosity eventually found its way into my legal career. I never wanted to memorize documents simply because they were required. I wanted to understand why they existed.

Why does a Separate Statement matter in a Motion for Summary Judgment?

What purpose does a declaration actually serve?

How does one pleading support another?

What happens if a piece is missing?

Once you understand the architecture of a case, individual tasks begin to make sense. You're no longer memorizing disconnected procedures. You're understanding an interconnected system.

Every Assignment Lives Inside Something Bigger

One of the most valuable lessons I've learned is that no assignment exists by itself.

Preparing a subpoena isn't really about preparing a subpoena. It's about obtaining evidence needed for a deposition, a motion, mediation, or trial.

Drafting a declaration isn't simply creating another document. It's helping establish facts that may determine whether a motion succeeds.

Preparing a trial exhibit list isn't clerical work. It's helping organize the story your attorney will ultimately present to the judge or jury.

Even calendaring isn't simply recording dates. It is coordinating decisions.

When we understand where our work fits within the larger case, the quality of our work changes. Knowing the purpose behind an assignment changes how carefully we approach it. It changes the questions we ask. It changes the problems we anticipate. Most importantly, it changes how much value we bring to the litigation team.

From Tasks to Systems

I often tell students that experienced legal professionals don't simply know more. They see more. That's because expertise isn't just about accumulating knowledge. It's about recognizing relationships. Eventually you stop seeing a motion. You begin seeing the evidence needed to support it. You stop seeing a deposition. You begin seeing how it will influence expert opinions, settlement discussions, and trial strategy. You stop seeing a deadline. You begin seeing every decision that must occur before that deadline can be

met successfully.

That's systems thinking. It's understanding that every piece exists because it supports something else. Pull one piece away and the entire structure begins to shift.

Pattern Recognition

One of the greatest compliments an attorney has ever paid me wasn't: "You never miss a deadline." It wasn't: "You're organized." It wasn't even: "You know the rules." It was this:

"You always seem to know what's coming next."

The truth is, I wasn't predicting the future. I was recognizing patterns. After enough cases, you begin noticing that one event almost always creates another. A deposition generates follow-up discovery. A discovery dispute creates a meet-and-confer process. A ruling on a motion changes litigation strategy. An expert request leads to additional document collection.

Eventually, you stop reacting to litigation. You begin anticipating it. And anticipation is one of the greatest gifts an experienced legal professional can offer an attorney, a client, and the entire litigation team.

Looking Beyond the Assignment

This shift in thinking also changes how we mentor newer legal professionals. Instead of saying: "Here's how to prepare this document." We begin saying: "Here's why this document matters." Instead of teaching isolated procedures, we teach context. Instead of giving people puzzle pieces, we show them the picture on the box. Once they understand the whole, every individual piece begins to make sense.

I've often found that when someone finally understands why they're doing something, they no longer have to memorize nearly as much. They can reason their way through unfamiliar situations because they understand how the system works. That's a much deeper level of learning.

The Question That Changed Everything

Looking back over my career, I don't think the most important lesson I learned was a procedural rule or a calendaring technique. It was learning to ask a better question. Not: "What do I have to do next?" But: **"What is actually happening here that I can't see?"**

That question has shaped the way I prepare for depositions, the way I organize trial notebooks, the way I build litigation calendars, the way I mentor new legal professionals, and the way I teach. Because every case contains visible work and invisible work.

The visible work appears on the calendar.

The invisible work determines the outcome.

Looking Beyond the Timeline

The next time you review a case timeline, resist the temptation to see only the milestones.

Look beneath the surface. Ask yourself:

What conversations need to happen before this event?

What decisions must be made?

What work is already quietly underway?

What will this event set into motion?

What am I not seeing?

Because that question changes everything. It transforms legal professionals from people who complete assignments into professionals who understand the architecture of a case. It transforms calendars into planning tools, documents into strategy, tasks into contribution. And over time, it transforms experience into judgment.

The timeline was never meant to tell the entire story. It simply marks the visible moments. The real case is unfolding every day between those dates — in the preparation, the collaboration, the anticipation, and the countless decisions that no timeline could ever capture. Once you begin seeing those invisible connections, you'll never look at litigation the same way again.

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»»» 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.



NextGen
Legal

The Deposition Process in California



Presented by: **Vanessa Buffington**

LPI Member - \$25
Non-Member - \$55

Wednesday, September 16, 2026
12:00 p.m. - 1:00 p.m.

Noticing a deposing 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.



About the Instructor

Vanessa Buffington 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.

For information or group registrations:
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Multiple Subpoenas to One Location: Is it a Red Flag or Something Else?

By Diann Cohen,
VP Client Services and
Dean of Education at
Macro-Pro, Inc.

Why multiple subpoenas often
reflect proper protocol—not abuse.



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SUBPOENA

SUBPOENA

SUBPOENA

SUBPOENA

SUBPOENA

Multiple subpoenas to one facility often raises a red flag. At first glance, it can look excessive; it can even look intentional.

Recently, I received a call from a district attorney's office regarding this exact issue. They were preparing to take action (the exact wording was "raid") against an applicant copy service business, believing the number of subpoenas served to a single location indicated fraudulent behavior.

After a short conversation and a bit of education, the situation became clear. What they thought was fraud was, in fact, the copy service following proper protocol. Most claims departments don't consider or understand how most facilities/custodians of records are actually structured. My hope for this article is to dispel the notion that one subpoena will work for every facility.

ONE LOCATION DOES NOT MEAN ONE CUSTODIAN

This is where the misunderstanding begins. Many large facilities operate under the same address but function with multiple independent departments. Billing, medical records, radiology, contracted emergency departments, outside billing, HR, and other departments often have separate custodians of records.

Under California law, records must be produced by the custodian of records or other qualified witness in response to a subpoena. (See California Evidence Code §§ 1560–1561.)

Each of these departments:

- Has an assigned custodian.
- Maintains its own records
- Follows its own release procedures
- Requires its own properly directed subpoena

What appears to be duplication is often just compliance.

WHY MULTIPLE SUBPOENAS ARE REQUIRED

Each department is responsible for maintaining records that may require a subpoena directed specifically to that custodian. If a subpoena is not properly directed, the records will not be produced.

In practice, this often results in:

- Separate Subpoenas Duces Tecum (SDT)
- Separate responses from each custodian
- Additional time if the request is not properly structured from the start

Copy services are not creating this structure. They are

navigating it.

WORKERS' COMPENSATION COMPLIANCE MATTERS

In California workers' compensation matters, copy services must also comply with the Copy Service Fee Schedule (Title 8, California Code of Regulations §§ 9980–9984).

These regulations require that services be:

- Reasonable
- Necessary
- Properly documented

When multiple custodians exist, serving each one may be required to obtain the records relevant to the claim.

THE COST OF GETTING IT WRONG

When subpoenas are not served the first time correctly, the consequences are predictable:

- Missing records
- Delayed decisions
- Additional subpoenas
- Increased costs due to rework

What may have looked like “too many subpoenas” is actually what is required. It is the facility that determines when and where the SDT must be served based on the records being requested. When multiple subpoenas are served to what appears to be a single location, it is often because the copy service is following the requirements necessary to obtain records from each responsible custodian.

Following the protocol is not abuse. There is a difference between overuse and proper execution.

Not doing so would be inefficient, ultimately more costly, and cause delays.

When handled correctly, this approach:

- Ensures records are produced the first time
- Reduces delays
- Prevents duplication of effort
- Supports timely and accurate claim decisions

THE TAKEAWAY

Multiple subpoenas to one location are not necessarily a sign of abuse. More often, they are a sign that the process is being handled correctly. When copy services follow the structure required to obtain records, they do not add cost—they prevent delays, reduce rework, and ensure the right records are obtained the first time.

It is worth noting that hospitals and larger facilities typically require multiple subpoenas. Places like independent doctors' offices and chiropractic offices, or smaller employers, for example, usually require only one subpoena.

Some examples of facilities requiring separate subpoenas:

All hospitals and clinics for: UC Regents, Providence, Sutter, Hoag, Desert Regional, John Muir, Alta Bates, Dignity Health, Kaiser, Scripps, Stanford, Cedars Sinai. There are more in every state.

Insurance companies: Require separate subpoenas for each claim.

WCAB: Separate requests for each claim.

Should you have any questions on this matter, please reach out to me at diann@macropro.com.

Disclaimer

This article is intended for informational purposes only and should not be considered legal advice. Readers should consult legal counsel for guidance specific to their situation.



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Diann Cohen is Vice President of Client Services and Dean of Education at Macro-Pro, Inc., where she manages the company's business-development team and educational department. A longtime workers' compensation professional, she is also an educator, speaker, writer, expert witness, and community builder.

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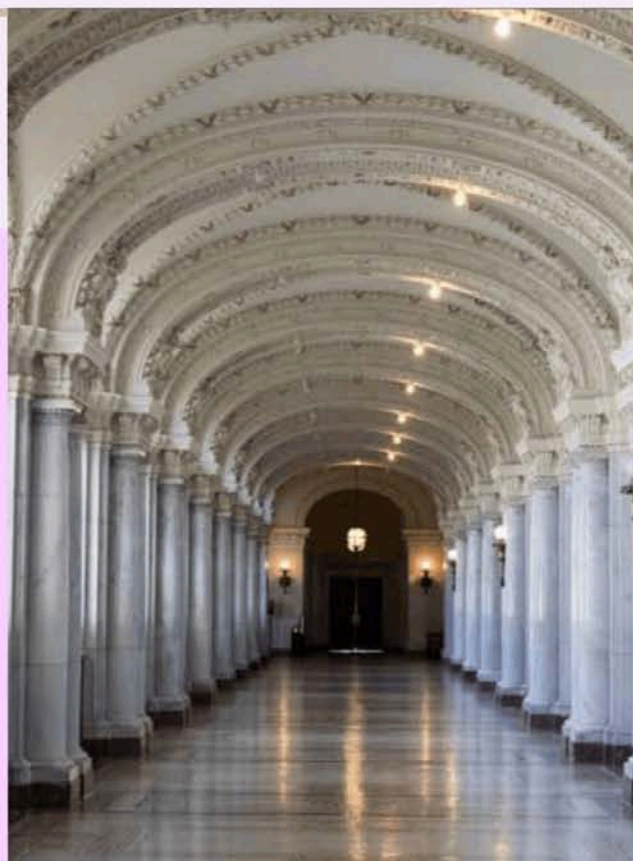
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How to Lead When You're Not the Boss

Practical ways to lead, prioritize and stay effective under pressure.

By Lisa Ezell-Macaluso

*Regional Director of Operations,
Service of Process Division
Proceed Legal*

It is 4:15 in the afternoon.

An attorney needs a document revised before the end of the day. A client is calling for an update. A filing still requires final review. Someone has changed the instructions, but the rest of the team may not know it yet. Every email is marked urgent, and every request seems to have arrived at once.

Legal professionals know this kind of day.

Court deadlines, client expectations, changing instructions, staffing limitations, and unexpected complications are part of working in a law firm. In service of process, where I have spent more than three decades, a missed detail can quickly become a filing problem, a hearing problem, a client problem, or a much larger case problem.

Urgency is not the enemy. Some matters truly require an immediate response. The problem begins when everything is treated like a five-alarm fire. Teams lose the ability to distinguish what is important from what is simply loud, communication breaks down, and mistakes become more likely.

That is how chaos becomes culture.

The person who exercises leadership and restores order in that moment is not always the attorney, department head, or person with the highest title. Often, it is an experienced legal assistant, paralegal, administrator, or office manager who pauses long enough to determine what must happen next.

That is leadership.



Leadership Does Not Require a Management Title

Legal professionals frequently carry responsibility without having final authority.

You may not control the court's deadline, the client's expectations, the attorney's preferences, or the number of people available to complete the work. Yet you may still be expected to identify problems, coordinate tasks, communicate changes, and help prevent something important from being missed.

That requires more than technical skill. It requires judgment.

Leadership in a law office can mean clarifying incomplete instructions, identifying conflicting deadlines, teaching a newer employee why a process matters, or lowering the emotional temperature when everyone else is escalating it.

These actions may never appear in a job description, but they are essential to effective legal operations.

Earlier in my career, I thought high performance meant working harder than everyone else and taking on as much as possible. I worked 80-hour weeks that sometimes approached 100 while raising three children and operating in survival mode. Eventually, I learned that being busy is not the same as being effective.

High performance is not doing everything yourself. It is making sound decisions under pressure, communicating clearly, helping others succeed, and creating enough stability for the team to perform well.

Clarify Before You Accelerate

When several urgent requests arrive at once, the natural reaction is to start moving faster.

Sometimes the better first step is to slow down just enough to clarify the situation.

1. What is the actual deadline?
2. What happens if this is not completed immediately?
3. What information, approval, or instruction is still missing?
4. Who else needs to know about the change?

For example, "I need this as soon as possible" may mean within the next 20 minutes. It may also mean before tomorrow morning. Those are very different assignments.

Legal professionals should not be expected to guess. When the consequences of an error are significant, clarification is not a delay. It is a form of risk management.

The same is true when priorities conflict. Instead of silently trying to complete everything, a legal professional can explain the available choices:

"I can complete the filing review or finalize the client materials by 3:00, but I cannot complete both accurately. Which should take priority?"

That is not refusing to work. It is communicating capacity, consequences, and risk in a professional way.

Explain Why the Work Matters

One of the biggest changes in my own leadership style came when I learned that giving instructions was not enough.

Earlier in my career, I could be rigid. I knew how I wanted something done, and I expected it to be done that way. Over time, I realized that people perform better when they understand not only what to do, but why it matters.

There is a difference between saying, "Use this procedure," and saying, "Use this procedure because the affidavit must match the service details exactly, and an inconsistency could create a challenge later."

The second explanation transfers knowledge. It gives the employee context that can be applied to the next assignment.

Experienced legal professionals often become the institutional memory of a firm. They know the court preferences, attorney habits, client requirements, filing procedures, exceptions, and workarounds that may not exist in any manual. That knowledge is valuable, but

when it remains in one person's head, it also creates risk.

Leadership means turning individual knowledge into shared knowledge. That may involve creating a checklist, documenting a recurring procedure, explaining the reason behind a rule, or training someone to recognize a problem before it reaches the final stage.

The goal is not to become the only person who can solve every problem, but to make the team stronger because of what you know.

Perfection Is Not Always the Standard

Legal work demands accuracy. Deadlines, filing requirements, client instructions, and procedural details matter.

But accuracy and perfectionism are not the same thing.

Consider an experienced paralegal preparing exhibits for a filing. They may spend additional time repeatedly adjusting page labels, rechecking formatting that already complies with the court's requirements, or reorganizing materials because they do not match her personal preference, even though the filing is accurate, complete, and ready for review. Meanwhile, another time-sensitive assignment remains untouched.

Attention to detail protects the firm and the client. But when additional effort no longer meaningfully improves the work, perfectionism can consume time needed for other assignments or lead experienced professionals to take work back from others.

That may solve an immediate problem, but it does not create a sustainable team.

A better question is whether the work is accurate, complete, timely, compliant, and appropriate for its purpose.

This also requires allowing other people to learn. Newer employees may not complete a task exactly as an experienced professional would. They need clear

expectations, useful feedback, and an opportunity to improve.

When we explain the impact of the work, rather than simply insisting on our preferred method, we create better judgment throughout the team.

Know When the Workload Has Become a Risk

The legal industry sometimes treats exhaustion as evidence of commitment.

There will always be demanding periods. There will be late filings, unexpected developments, difficult clients, and days when everyone must do more than usual.

But constant overload is not sustainable. It weakens judgment, shortens communication, and makes people less likely to ask questions that could prevent a larger problem.

The warning signs may appear gradually. A legal professional may notice that they are:

- reading the same email or document without absorbing the information;
- having difficulty deciding which assignment should come first;
- becoming unusually impatient, detached, or frustrated with routine requests;
- making small mistakes in work ordinarily completed without difficulty; or
- finishing the day exhausted but still unable to mentally disengage from work.

Any one of these experiences can happen during an unusually difficult day. When several become recurring patterns, however, the workload may no longer be merely demanding. It may be interfering with judgment, communication, and professional effectiveness.

Knowing your bandwidth is part of professional responsibility.

Not every legal professional has complete control over workload, office culture, or staffing. But even in a demanding environment, it is important to identify what

can be clarified, delegated, documented, escalated, or postponed.

It is also important to recognize when you need a brief reset.

During especially demanding periods, I sometimes shut my door for 15 minutes, turn on a little Aerosmith, have a Cherry Coke, and regain my focus. For someone else, the reset may be a short walk or a few quiet minutes away from the screen.

These small pauses are not signs of weakness. Composure is part of effective performance, and sometimes composure requires a moment to reset.

Be the Person Who Lowers the Temperature

Legal professionals often become the people others rely on when the day becomes difficult.

That trust is earned through competence, consistency, judgment, and the ability to remain clear when circumstances are not.

Leadership in those moments does not mean absorbing every problem or carrying the entire office alone. It means helping the team understand the priorities, consequences, and next steps.

It means asking questions instead of making assumptions, communicating what can realistically be completed, and sharing knowledge rather than guarding it. It also means supporting others without sacrificing your own health, peace, or sense of self.

The best leaders are not always the people with leadership in their titles. They are the people who create clarity, build trust, develop others, and help their teams move through pressure without allowing chaos to define the culture.

When everything feels urgent, be the person who helps others see what truly matters.

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LISA EZELL-MACALUSO

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Lisa brings more than three decades of experience in litigation support to her role as Regional Director of Operations, Service of Process Division, at [Proceed Legal](https://proceedlegal.com). She has worked across field service, client service, management, and multi-state legal operations. She is a member of the National Association of Professional Process Servers (NAPPS) and the California Association of Legal Support Professionals (CALSPRO). She is a supporting member of the Texas Process Servers Association (TPSA) and serves on the board of the Arizona Process Servers Association (APSA).

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What Would a Legal Professional from 1776 Think If They Walked Into Your Office Today?

By Lynne Prescott, CCLS

Contributing Editor

Imagine, for just a moment, that a legal professional from 1776 suddenly appeared in your law office. As they stepped through the doorway, they would likely stop in amazement. There are no shelves lined with leather-bound law books. No quill pens resting in ink wells. No handwritten pleadings drying on a desk. No messenger waiting to deliver documents to the courthouse on horseback.

Instead, computer monitors glow from every workstation. Attorneys appear in meetings with clients hundreds of miles away through video conferencing. Court hearings take place on a screen. Documents travel across the country in seconds. A pleading is filed with the court without anyone ever leaving the office.

To our visitor from 1776, it would seem almost unimaginable. And yet, after the initial astonishment wore off, I think they would recognize something remarkably familiar.

The technology has changed.

The mission has not.

A Profession Built on the Rule of Law

The year 1776 marked the birth of a nation founded on an extraordinary principle: that the rule of law, not the rule of any one individual, would guide the future of our country. In the years that followed, our Constitution



established a framework for government, protected individual liberties, and created an independent judiciary charged with interpreting and applying the law fairly.

That framework has endured for 250 years. The methods we use to carry out that work have changed dramatically, but the responsibility entrusted to those who work within the legal system has remained remarkably constant.

A Walk Through a Modern Law Office

If our visitor continued exploring today's office, nearly every room would present another surprise. Instead of searching through volumes of case reporters, legal professionals conduct research in online databases that provide decades of case law in seconds.

Instead of dictating letters to a clerk, attorneys and legal professionals draft pleadings collaboratively, often working simultaneously from different locations.

Instead of mailing discovery requests and waiting days or weeks for delivery, documents are exchanged electronically almost instantly.

Court calendars, once handwritten or maintained in paper planners, are now integrated into sophisticated case management systems that track deadlines, reminders, hearings, and workflow.

Artificial intelligence can summarize lengthy documents, organize information, and assist with drafting.

To someone from 1776, it might feel less like a law office and more like science fiction.

“Has Justice Changed?”

Eventually, I imagine our visitor asking a simple question.

“With all of these extraordinary changes...has justice changed?”

The answer would surprise them.

No. Justice still depends upon preparation. It still depends upon integrity. It still depends upon fairness. It still depends upon careful attention to facts, deadlines, procedures, and ethical responsibilities.

Technology has transformed *how* we perform our work.

It has not changed *why* we perform it.

The Things That Haven't Changed

Although legal practice has evolved in countless ways, many of the qualities that define an excellent legal professional would be immediately recognizable to someone from 1776.

Accuracy still matters.

Professional judgment still matters.

Confidentiality still matters.

Respect for the courts still matters.

Attention to detail still matters.

Preparation still matters.

Service still matters.

Whether drafting a pleading with a quill pen or electronically filing a motion from a laptop, our responsibility remains the same: to help ensure that the legal system functions with fairness, accuracy, and integrity.

From Paper Files to Artificial Intelligence

During my own career, I have witnessed a remarkable chapter in the history of legal practice. When I entered the profession, typewriters were still common. Carbon paper produced multiple copies of documents. Legal research often meant spending hours in a law library surrounded by shelves of reporters and statutes. Documents were mailed, hand-delivered, or sent by messenger.

Fax machines revolutionized communication. Word processors replaced typewriters. Electronic filing transformed court practice. Remote hearings became

commonplace. Today, artificial intelligence is beginning to reshape how we organize, analyze, and prepare legal work.

The pace of change has been extraordinary. Yet every new innovation has shared the same purpose: helping legal professionals serve clients more effectively while supporting the administration of justice.

Technology has changed our tools. It has not changed our values.

The Human Element

One lesson has remained true across every generation of legal practice: People, not technology, move cases forward.

Technology can organize information. It can accelerate communication. It can improve efficiency.

But it cannot replace judgment. It cannot build trust with a client. It cannot exercise professional discretion. It cannot understand the nuance of a difficult conversation or the importance of extending grace to a colleague during a stressful trial.

The legal profession has always been, and will continue to be, a profession built upon *people serving people*.

Looking Ahead

As America celebrates 250 years of independence, it is worth reflecting not only on how far our legal system has come, but also on the countless individuals who have quietly sustained it every step of the way.

Judges.

Attorneys.

Court staff.

Paralegals.

Legal assistants.

Legal secretaries.

Law clerks.

Court reporters.

Interpreters.

Technology specialists.

Each generation has inherited the responsibility of preserving the integrity of our legal system while embracing the changes necessary to serve the next generation. We are simply the current custodians — the stewards — of that responsibility.

Someday, another legal professional may look back on our offices with the same amazement that our visitor from 1776 would experience today. Artificial intelligence will likely seem primitive. Our computers may appear quaint. Electronic filing may feel as outdated as carbon paper now seems to us.

But I hope one thing remains exactly the same: that they recognize a profession committed to justice. A profession built upon integrity. A profession dedicated to serving others.

Because while the tools of legal practice have changed dramatically over the past 250 years...

The responsibility has not.



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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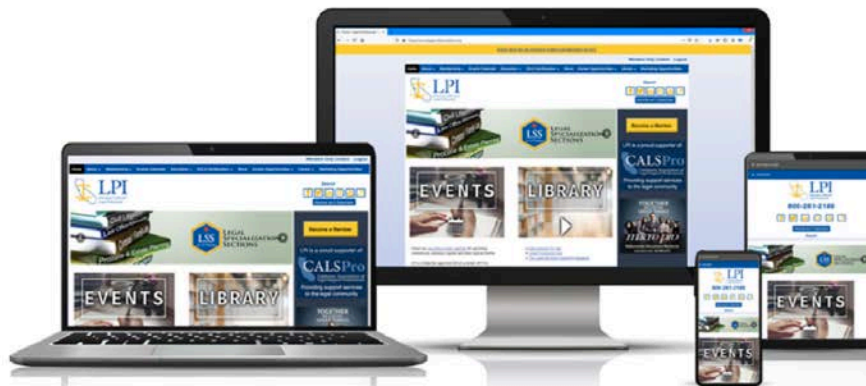
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CALENDAR OF EVENTS

**AUG
18**

Legal Technology Training • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours including 1.0 hours of Ethics • CCLS Recertification Credit: 1.0 Hours

Webinar – Microsoft Copilot for Legal Professionals: Practical AI Workflows and Ethical Use

Presented by: June Hunter

This program explores how Microsoft Copilot can improve productivity across Word, Outlook, Teams, Excel, and PowerPoint for legal professionals. The session will compare Copilot to tools such as ChatGPT, Harvey, and LexisAI, while also addressing ethical considerations, confidentiality concerns, and best practices under ABA Formal Opinion 512.



**AUG
20**

SUMMER COURT SERIES — LIVE WEBINAR • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Orange County Superior Court

Do you have questions for the court clerks? Join us as the court clerks provide information on their court process, procedures, and updates, followed by a Q&A session.

FREE for LPI Members — [JOIN TODAY!](#)

**2026 SUMMER
COURT SERIES**

**AUG
20**

LOCAL ASSOCIATION EVENT • San Francisco Legal Professionals Association • 6:00 p.m. - 8:00 p.m.

Membership Happy Hour

Join San Francisco Legal Professionals Association for an evening of appetizers, drinks, and great company at Patriot House! Reconnect with colleagues, meet new friends, and renew your SFLPA membership!



Virtual Day of Education and First Quarterly Board of Governors Meeting



Saturday, August 22, 2026

FREE for LPI Members • \$30 per class for Non-Members

**AUG
22**

Class 1: 8:30 a.m. - 9:30 a.m.

Trust Administration After Death: A Roadmap for Trustees

Presented By: Gina Leguria, Esq.

What exactly happens after the settlor dies—and what must a trustee do first? This webinar breaks down the trust administration process into manageable steps, explaining key deadlines, legal requirements, and best practices. From locating assets and issuing statutory notices to handling debts and making distributions, this session provides trustees with a practical roadmap to stay compliant and confident throughout the process.

FREE for LPI Members — [JOIN TODAY!](#)



**AUG
22**

Class 2: 9:45 a.m. - 10:45 a.m.

The Three Bridges of Legal Practice: From Assignment to Outcome

Presented by: Lynne Prescott, CCLS

In this profession, we don't struggle because people aren't working hard. We struggle because somewhere between what was intended and what was executed, something gets lost. In this session, we will cover what gets lost and how we fix it, where work usually breaks down in legal teams, how to ensure it doesn't, and crossing the three critical bridges in every assignment.

FREE for LPI Members — [JOIN TODAY!](#)



**AUG
22**

Class 3: 11:00 a.m. - 12:00 p.m.

Mastering the Schedule of Assets and Debts in Family Law

Presented by: Chandra E. Miller, Esq.

This webinar will guide participants through the process of accurately completing the Schedule of Assets and Debts, a key document in family law cases. Attendees can expect practical instruction on identifying, categorizing, and valuing assets and liabilities, along with best practices for thorough financial disclosures and compliance with court requirements. The session will also highlight common pitfalls to avoid and provide strategies to ensure documents are clear, complete, and effectively prepared for legal proceedings.

FREE for LPI Members — [JOIN TODAY!](#)



All seminars are approved for California Minimum Continuing Legal Education (MCLE) and CCLS recertification credit in the amount of 1.0 hour each.

**AUG
25**

LPI University • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar – California Style Manual: Citations for California Courts

Presented by: Bethany S. Ensiz, M.S.

Gain a practical understanding of the California Style Manual and learn how to accurately cite cases, statutes, regulations, and other legal authorities in California court filings. This webinar will cover essential citation rules, common formatting requirements, real-world examples, and tips for avoiding frequent citation mistakes.



LEGAL PROFESSIONALS INCORPORATED IS A CALIFORNIA STATE BAR-APPROVED MCLE PROVIDER.
MOST LPI SEMINARS, WEBINARS, AND TRAINING PROGRAMS QUALIFY FOR BOTH MINIMUM CONTINUING LEGAL
EDUCATION (MCLE) CREDIT AND CALIFORNIA CERTIFIED LEGAL SECRETARY (CCLS) RECERTIFICATION CREDIT.

**AUG
25**

LOCAL ASSOCIATION EVENT • San Francisco Legal Professionals Association • 12:30 p.m. - 1:30 p.m.

New Year, New Rules: California's Changing Service Laws

Presented by: Sheila Grela

Sheila Grela is a Senior Paralegal and Certified eDiscovery Specialist with significant experience in litigation support, electronic discovery, and case management. She specializes in managing complex legal data and helping legal teams navigate all phases of the litigation process efficiently and effectively.



**AUG
26**

LPI University & NextGen Legal • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - All You Need to Know About Filing a Complaint in California

Presented by: Vanessa Buffington

Your office has signed up a new client and it's time to file the complaint with the court. What do you need to know in order to get your complaint filed? What will you need to do after the complaint has been filed? This webinar will provide you with the information you need to assist you in preparing to have a seamless filing.



**NextGen
Legal**

**AUG
27**

SUMMER COURT SERIES — LIVE WEBINAR • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Contra Costa County Superior Court

Do you have questions for the court clerks? Join us as the court clerks provide information on their court process, procedures, and updates, followed by a Q&A session.

FREE for LPI Members — JOIN TODAY!

**2026 SUMMER
COURT SERIES**

**AUG
29**

LOCAL ASSOCIATION EVENT • Santa Clara County Legal Professionals Association & San Mateo County Legal Professionals Association • Game Time: 7:05 p.m.

San Francisco Giants Baseball Game

San Francisco Giants vs Arizona Diamondbacks at Oracle Park.



**AUG
31**

LOCAL ASSOCIATION EVENT • San Diego Legal Secretaries Association • 12:00 p.m. - 1:00 p.m.

Summer Subpoena Series! - 3-Part Lunch & Learn - Part 3

Presented by: Jim Ayer Vice President, Titan Legal



**SEP
1**

Legal Technology Training • 12:00 p.m. - 1:00 p.m. • CCLS Recertification Credit: 1.0 Hours

Webinar – Unlocking the Power of Word Styles: Streamline Your Workflow and Troubleshoot Formatting Issues

Presented by: June Hunter

Discover the time-saving potential of Word's Styles feature in this in-depth webinar. Designed for legal professionals and office users alike, this session will explore the full range of capabilities within Word, including built-in themes, how to identify, create, and modify styles, and troubleshooting common formatting issues. Learn how to apply consistent formatting across your documents, improve document navigation, and save valuable time by automating repetitive tasks. Whether you're preparing legal briefs, reports, or correspondence, this webinar will help you take full advantage of Word's powerful styling tools to enhance your productivity and ensure professional results every time.



**SEP
3**

Continuing Legal Education • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - The Strategy and Related Procedures of International Service of Process

Presented by: Don Fritsch, First Legal Investigations

Join us for a one-hour webinar that explores the strategy and key procedures involved in effecting international service of process. This session will provide practical guidance on navigating complex legal frameworks, avoiding common pitfalls, and ensuring compliance with international treaties and local laws.

FREE for LPI Members — JOIN TODAY!



**SEP 8 -
NOV 3**

MULTI-WEEK COURSE — 8-Week Live Zoom Series

Beginning Legal Secretarial Training Online Course

Work-at-your-own-pace. Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the course.

This course includes the Legal Professionals' Reference Guide



**NextGen
Legal**

**SEP 8 -
NOV 3**

MULTI-WEEK COURSE — 8-Week Live Zoom Series

Overview of California Discovery Online Course

Work-at-your-own-pace. Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the course. The modules for this class will be taken from the Beginning Legal Secretary Training course for people that have worked in a law office but are new to civil discovery.

The content of this course is designed for legal secretaries and those studying for the California Certified Legal Secretary (CCLS) examination.



**NextGen
Legal**

SEP
8

Legal Technology Training • 12:00 p.m. - 1:00 p.m. • CCLS Recertification Credit: 1.0 Hours

Webinar – The Legal Spreadsheet Survival Guide: Excel Tips That Actually Help

Presented by: June Hunter

Excel doesn't have to be overwhelming. This practical webinar is designed specifically for legal professionals who want straightforward, useful Excel tips they can apply immediately. Learn how to clean up and organize data, use simple formulas, avoid common mistakes, and work more efficiently with spreadsheets in a legal setting. Whether you're tracking information, reviewing data, or preparing reports, these real-world tips will help you save time, reduce errors, and make Excel work for you.



SEP 9 -
NOV 4

MULTI-WEEK COURSE — 8-Week Live Zoom Series

Trial Preparation Online Course

Work-at-your-own-pace. Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the course.

Cost includes a Trial Preparation Reference Guide.



NextGen
Legal

SEP
9

LOCAL ASSOCIATION EVENT • Santa Clara County Legal Professionals Association • Registration/Dinner/Meeting: 6:00 p.m. • Program: 6:30 p.m. - 7:30 p.m.

Navigating E-filing in Federal and California State Civil Litigation: A Practical Overview for Attorneys and Firm Staff

Presented by: Phil K. Rucker Managing Attorney, Office of the Clerk, Wilson Sonsini Goodrich & Rosati

Whether you are an attorney or firm staff member, navigating the ever-evolving landscape of electronic filing can be challenging. This presentation offers a practical overview of eFiling basics in civil cases across federal and California state courts, highlighting common pitfalls to anticipate and avoid along the way.



SEP
9

LOCAL ASSOCIATION EVENT • Stanislaus County Legal Professionals Association • Welcome Mingle: 5:30 p.m. • Meeting Begins: 6:00 p.m. • Speaker: 6:30 p.m. - 7:30 p.m.

Proper Components of a Marital Settlement Agreement A-Z, including all the legalese

Presented by: Andrea M. Leavy, Esq. Goss, Goss & Leavy, Inc.

This presentation provides a practical A-Z overview of the key components of a Marital Settlement Agreement, including the essential terms, required provisions, and the legal language commonly used in drafting. Participants will gain a better understanding of how to structure a complete agreement, address common issues, and ensure the document clearly reflects the parties' rights and obligations.



SEP
10

Continuing Legal Education • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar – How to Effect Service by Publication

Presented by: Don Fritsch, First Legal Investigations

A practical 1-hour webinar that will guide you through the legal requirements and procedures for obtaining court permission and completing service by publication correctly and effectively.

FREE for LPI Members — JOIN TODAY!



SEP
12

LOCAL ASSOCIATION EVENT • San Francisco Legal Professionals Association • 1:05 p.m.

Baseball Matchup - Giants vs Padres

San Francisco Giants vs San Diego Padres at Oracle Park.



SEP 15 -
OCT 27

MULTI-WEEK COURSE — 6-Week Live Zoom Series

Advanced Discovery Online Course

Work-at-your-own-pace. Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the course.

Cost includes a Advanced Discovery Reference Guide.



NextGen
Legal

SEP 15 -
NOV 10

MULTI-WEEK COURSE — 8-Week Live Zoom Series

Appellate Procedures in California and The Ninth Circuit Court of Appeals Online Course

Work-at-your-own-pace. Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the course.



NextGen
Legal

SEP
15

LPI University • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours including Ethics credit 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - To Rat or Not to Rat? – A Deep Dive into Rule 8.3 of the Rules of Professional Conduct

Presented by: Bethany S. Ensz, M.S.

The ethical dilemma of reporting professional misconduct is one that every legal professional may face. In this thought-provoking webinar, we'll explore Rule 8.3 of the Rules of Professional Conduct, which requires the reporting the misconduct lawyers under certain circumstances. Is it an obligation to rat out colleagues and/or employer, or is it an act of professional responsibility? Join us for an in-depth discussion of this crucial ethical issue in legal practice.



**SEP
15**

LOCAL ASSOCIATION EVENT • San Mateo County Legal Professionals Association • Meeting: 6:30 p.m. • Speaker: 6:40 p.m. - 7:40 p.m.

Deepfakes-Authenticity On Trial: Identifying & Defending Against Manipulated Media in eDiscovery**Presented by: Sarah Thompson** CPO, BlueStar Case Solutions, Inc.

Examine fast changing generative AI capabilities & impact of Deepfakes on Digital Evidence & eDiscovery Practice. We will explore: Practical indicators of deepfakes; Preservation & Discovery Implications; AI-generated artifacts & metadata; Professional responsibility standards that require technical competence & thoughtful oversight.

**SEP
16**

LPI University & NextGen Legal • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - The Deposition Process in California**Presented by: Vanessa Buffington**

Noticing a deposing 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.

**NextGen
Legal****SEP
17**

SUMMER COURT SERIES — LIVE WEBINAR • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

U.S. District Court - Southern District of California

Do you have questions for the court clerks? Join us as Joseph Diaz, CM/ECF Coordinator and Andrew Sacco, CM/ECF Administrator will provide information on their court process, procedures, and updates, followed by a Q&A session. Topics include: Security with MFA (Multi Factor Authentication); NextGen CM/ECF – Newest Version 1.9; Attorney Admissions Reminders and Best Practices / CSO (Central Sign On); Submit New Civil Case / Pay Filing Fee via Pay.gov; and Common Issues with Non-Compliance – QC Mailer.

**2026 SUMMER
COURT SERIES**FREE for LPI Members — [JOIN TODAY!](#)**SEP
19**

LOCAL ASSOCIATION EVENT • San Mateo County Legal Professionals Association • Doors Open: 6:00 p.m. • Dinner Begins: 6:30 p.m. • Bingo Starts: 7:00 p.m.

Fiesta Bingo Night & Taco Bar

Great Food • Great Prizes • Great Company!

**SEP
22**

LPI University • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - California Writ Procedures**Presented by: Lynne Prescott, CCLS**

This webinar provides a practical overview of California writ procedures, including the purpose of writ relief, the most common types of writs, procedural requirements, accelerated timelines, and the critical role legal professionals play in supporting these high-stakes proceedings. Participants will gain a clearer understanding of how writs function within California practice and how extraordinary relief can impact the course of litigation. Whether you support trial teams, appellate counsel, or both, this webinar will provide practical insight into one of California litigation's most specialized procedural tools.

**SEP
24**

Continuing Legal Education • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar – Order in the Chaos: Complex Litigation Demystified**Presented by: Thomas (T.J.) Martin**

Complex litigation brings added layers of procedure, cost, and coordination—and paralegals and legal administrators are at the center of it all. This session breaks down what makes a case “complex,” who determines that designation, and how it shapes filing requirements, fees, and deadlines for all parties. Learn how to stay ahead of critical timelines, manage required forms, and effectively work with third-party vendors for case management and tracking. Walk away with practical strategies to keep complex cases organized, compliant, and on track from start to finish.

FREE for LPI Members — [JOIN TODAY!](#)**SEP
26**

LOCAL ASSOCIATION EVENT • Placer County Legal Professionals Association • 1:00 p.m.

LPI President Bettina Herrick-Jacobson's Celebration Lunch

Seating is limited. Kindly RSVP no later than September 11, 2026.

**OCT
1**

Continuing Legal Education • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar – Your Partner in ADR: Practical Insights from Judicate West**Presented by: Heidi Adams and Melissa Gorin, Judicate West**

What Rules does Judicate West Use? How does the scheduling process work? How do you file documents? What are the key deadlines? Can proceedings be conducted remotely? How do you select a neutral? Learn directly from Judicate West as they answer these questions and more, while sharing best practices, practical tips, and proven strategies to help you navigate the dispute resolution process with confidence and avoid common mistakes.

FREE for LPI Members — [JOIN TODAY!](#)

OCT
3

LPI University • Saturday, 9:00 a.m. - 11:00 a.m. • No MCLE Credit Offered • CCLS Recertification Credit: 2.0 Hours

Webinar - Probate Basics for Beginners

Presented by: Lynne Prescott, CCLS

Whether you're new to probate or want to sharpen your foundational knowledge, this comprehensive 2-hour webinar will give you the essential tools and confidence to get started right. Webinar includes: The probate process step-by-step; Key documents and court forms; Overview of executor and attorney responsibilities; Common issues and how to avoid them practical tips for working with clients and the court.



OCT
14

LPI University & NextGen Legal • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - Requesting Your Client's Medical Records

Presented by: Vanessa Buffington

This webinar is designed to assist you with requesting your client's medical records from various facilities. We will go over topics such as HIPAA compliance, client authorization, requesting records from private practices, billing records and more.



NextGen
Legal

OCT
20

LPI University • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - Legal Research Best Practices: Using ChatGPT and AI in Legal Practice What You Need to Know Before Your Filing Goes Out the Door

Presented by: Bethany S. Ensz, M.S.

Artificial intelligence is rapidly transforming the legal profession, but with convenience comes responsibility. This practical and engaging class explores how legal professionals can effectively and ethically use AI tools like ChatGPT to support legal research, drafting, citation review, and workflow efficiency—without compromising accuracy or professional standards. Participants will learn best practices for verifying AI-generated content, identifying hallucinated cases and citations, protecting confidentiality, and maintaining compliance with court rules and ethical obligations. Through real-world examples and practical tips, this course provides the knowledge legal teams need to confidently use AI while ensuring every filing is accurate, credible, and ready before it goes out the door.



OCT
21

LPI University & NextGen Legal • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours including 1.0 Hours of Competency • CCLS Recertification Credit: 1.0 Hours

Webinar - Requesting a Default Judgment in California Superior Court

Presented by: Vanessa Buffington

When a defendant has failed to file a response to a summons and complaint, the plaintiff has the option to file a request for default. This involves preparing multiple documents, calculating special damages and having a prove-up hearing. This webinar will go over the necessary steps to prepare and file a request for default judgment.



NextGen
Legal

NOV
9

LPI University • 9:00 a.m. - 11:00 a.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - Beyond the Vault: Digital Assets in Estate Planning

Presented by: Lynne Prescott, CCLS

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.



NOV
11

LPI University & NextGen Legal • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - Notice of Appeal: What Should be on Your Checklist

Presented by: Vanessa Buffington

There are many things to consider when filing an appeal to a lower court's order or judgment. How do you bring an appeal and when? How do I calendar deadlines? How should documents be prepared? This webinar will provide you with an abundance of information and tips for successfully navigating the California Courts of Appeal.



NextGen
Legal

DEC
3

Continuing Legal Education • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - Bulletproof Service of Process: A Guide to Getting It Right the First Time

Presented by: Jonathan Shisler, A2Z Attorney Service

Service of Process can make or break a case and small mistakes can lead to costly delays, re-service, or challenges in court. This practical, real-world session is designed specifically for legal professionals who want to ensure service is done right the first time.

FREE for LPI Members — JOIN TODAY!



DEC
9

LPI University & NextGen Legal • 12:00 p.m. - 1:00 p.m. • MCLE Credit: 1.0 Hours • CCLS Recertification Credit: 1.0 Hours

Webinar - Preparing an Appendix with the California Court of Appeal

Presented by: Vanessa Buffington

This webinar goes over the practice and procedures of preparing an appendix with the California Court of Appeal. We will go document organization, preparing the index and more.



NextGen
Legal



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NOVEMBER 14, 2026

Fall SILENT AUCTION

Presented by: Fresno County Legal Professionals
Association

Time: TBD
Tickets \$50.00

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DATE

December 3, 2026



TIME

12:00 pm – 1:00 pm



FORMAT

Live Webinar



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NON-LPI MEMBERS

\$55



SPEAKER

Jonathan Shisler

Jonathan Shisler is the Founder and CEO of Azz 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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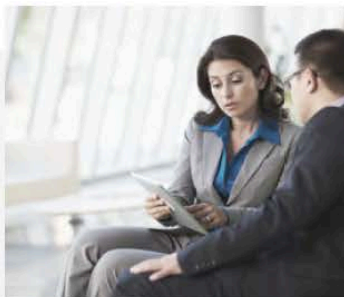


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