IN THIS ISSUE
5 EASY THINGS YOU CAN DO TO PROTECT YOUR FAMILY

ROBERT MANSOUR
Features

Education, Leadership, Mentoring by Brooke Mansfield-Atherton, CCLS ........................................... 2

LSI Third Quarterly Conference 2011 Photos ........................................... 4, 5

Officer Chairman Workshop Schedule ........................................... 6

What's Your APPTitude? by Dimetria A. Jackson, Esq ........................................... 7

Parliamentary Procedure 101 by Julie Edsill, CCLS ........................................... 9

What Great Legal Secretaries Know About Technology by Jody Lea Rothwell ........................................... 10

William A. Rutter Memorial ........................................... 15

CCLS – Dates and Deadlines You Need To Know by Michelle Rodgers, CCLS and Terrie Quinton, CCLS ........................................... 16

5 East Things You Can Do To Protect Your Family by Robert Mansour, Esq ........................................... 18

Getting The Right Things Done When Your World Is Crazy Busy by Vicki Voisin, ACP ........................................... 19

The Power Of Networking Overcoming Fear And Making Friends by Ana Fatima Costa, CSR, RPR, CLSP ........................................... 24

Now That You Are A Notary, What’s Next? by Hannalore Dietrich ........................................... 26

The Seven Deadly Sins of Trust Drafting by Mark W. Bidwell, Esq ........................................... 28

Happy Days Are Here Again by Michelle Tice, CCLS and Elizabeth Adame, CCLS ........................................... 30

Social Networking Research & Investigations by Richard B. Harer ........................................... 32

A Message From The Editor by Deborah Rickert, CCLS ........................................... 34

Guidelines For Submission Of Articles To The Legal Secretary by Deborah Rickert, CCLS ........................................... 35

CCLS Legal Terminology Quiz by Terrie Quinton, CCLS ........................................... 36

Columns

President's Message by Brooke Mansfield-Atherton, CCLS ........................................... 2

Departments

LSI Conference Scrapbook ........................................... 4, 5

Legal Specialization Section Application ........................................... 13

Legal Specialization Section Workshops ........................................... 17

Conference Hotel Registration ........................................... 22

Conference Registration ........................................... 23

Dates To Remember ........................................... 37

LSI Order Form ........................................... 39

CCLS Exam Application ........................................... 41

LSI Benefits ........................................... 43

LSI Roster ........................................... 44

Advertisers Index

Atkinson Baker ........................................... 8

Barkley Court Reporters ........................................... IFC

Capital Investment Advisers ........................................... 3

Carol Nygard & Associates ........................................... 25

Fersch, Emerson ........................................... 29

First Legal Network ........................................... IBC

Hutchings Court Reporters ........................................... 20

Janney & Janney Attorney Service, Inc. ........................................... Back Cover

Kramm Court Reporting ........................................... 12

The Rutter Group ........................................... 21, 38

THE LEGAL SECRETARY MAGAZINE

is published Quarterly by Legal Secretaries, Incorporated

Edited by: DEBORAH RICKERT, CCLS

Designed by: PERRY BLEECKER, Perry Bleecker Design

Printed by: MODERN LITHO

Copyright © 2012 by Legal Secretaries, Incorporated. P.O. Box 58, Seely, CA 92273. All rights reserved. Reproduction in whole or in part without the express permission of Legal Secretaries, Incorporated is prohibited. "The Legal Secretary" is a registered trademark of Legal Secretaries, Incorporated.
Education, Leadership, Mentoring

BROOKE MANSFIELD-ATHERTON, CCLS — LSI PRESIDENT

What an amazing year it has been for LSI. This past year has seen great change. It is an exciting time to be a member of LSI. For those who attended conferences, you have witnessed an increase in member participation in making motions and entering into discussion on those motions. More members are asking questions on the Executive Committee Resume and taking an active role in the running of LSI.

Three significant things happened at our February 2012 Quarterly Conference. The first was a recommendation that, with the exception of the LSI Treasurer’s Report and the Executive Committee Resume, all officer and chairman reports will be posted to the LSI website no later than seven days prior to conference, as to be available to read and print in advance of conference. This change will go into effect June 1. What does this mean? It means we are going paperless! Beginning at our August Quarterly Conference there will no longer be packets of reports for Governors, Officers, Chairmen, Past Presidents or Members-at-Large.

Local association Governors will need to come prepared to the August Conference with all reports either printed in hard copy, or saved to their laptops or iPads for easy reference during the Board of Governors’ meeting. This is a significant change for LSI, and has us moving forward into a more positive and efficient direction.

Another significant event was the adoption of the Ad Hoc Committee’s recommendation to hire Bop Design as our marketing firm. Within that recommendation was the provision that an ad hoc committee be appointed to work with Bop Design and act as a liaison between LSI and Bop Design. This committee will keep us updated on suggestions for marketing strategies and updating our logo, website and suggestions for a possible name change or name modification.

The Board of Governors also approved to recommend a proposed Bylaw amendment, and local associations have received that written notice. Voting took place according to our Bylaws. Please refer to the article written by our Parliamentarian, Julie Edsill, CCLS, in this issue of The Legal Secretary for more details. The proposed amendment is to Bylaw Article V, Section 1(a), which reads as follows.

(a) Qualifications. An active member shall be a person: (1) licensed to practice law; (2) employed as legal support staff in the office of any attorney engaged in the practice of law; (3) employed by the courts; (4) employed in any other institution or office directly engaged in work of a legal nature, in California; or (5) who possesses, or is in the process of obtaining, a degree or certificate from an educational institution which is related to the field of law.

This does not change the ability of the local associations to continue to provide “associate” or “student” membership at the local level. Typically, this category of member pays dues only to the local association and not to LSI. Local associations would now have the option of including students as full members to LSI, who would then have access to all benefits of LSI membership, such as our magazine, The Legal Secretary.

The Executive Committee, Marketing Committee and LSI Past Presidents have worked this past fiscal year to help market LSI by staffing the LSI booth at the State Bar of California Annual Meeting. Contact information gathered at the State Bar Annual Meeting is then forwarded to the appropriate local associations. I hope that you have taken advantage of the contact information sent to your asso-
cation, and followed through with making contact with these individuals who have shown an interest in LSI.

The members of the Executive Committee and Marketing Committee have also attended conferences held by the California Alliance of Paralegal Association (CAPA) and the Bay Area Legal Forum. Contact information from these events was also forwarded to local associations. Take advantage of the seeds that have been planted. Follow up on these contacts by inviting them to attend your meetings, educational seminars or other special events.

Regardless of our title, paralegal, legal assistant or legal secretary, we all require continuing education to remain current in our area of practice. The Legal Specialization Sections offer a very affordable way to meet your continuing educational needs. Members of a specific section can attend seminars at no cost if they pre-register. If you are not a member of all sections, you can attend sections that you do not hold membership in at a reduced price. LSI is an approved MCLE provider. To learn how your association can provide MCLE approved programs to your local legal community, purchase the Guidelines for Preparation of a Legal Educational Program from the LSI website.

The month of May marks the beginning of our fiscal year, and most associations have already held their installations of new officers and chairmen. The May Annual Conference will provide you with the opportunity to take workshops on several topics to assist you in the new fiscal year. The Officer Chairman Workshops are a great way to network and mentor with your fellow legal professionals. The Presidents' Roundtable will be moderated by Lorraine Bettencourt, PLS, CCLS; LSI Past President 2006 - 2008. The Governors Workshop is designed for our new Governors, to explain the duties and role of Governor, and will be moderated by LSI Executive Advisor, Christa Davis. In addition, we will have a combined workshop on Minutes, Notes and Correspondence & Parliamentary Procedure, moderated by Mary J. Beaudrow, CCLS and Julie Edsill, CCLS; Treasurer's Duties/Corporate Office, moderated by Jennifer L. Page, CCLS and Catherine Culver; CCLS; Legal Secretary Training/Seminars; Ways and Means - Successful Local Association Events; Newcomers Workshop; Membership/Chapter Achievement; Programs and Hosting Conferences.

If you have attended a Quarterly Conference (August, November & February), but have never attended an Annual Conference, I strongly urge you to attend our May 2012 Annual Conference hosted by Imperial County LPA and San Diego LSA in San Diego, California. I encourage each association to participate to the fullest. Attend the Officer Chairman Workshops, enter your bulletin in the Bulletin Contest, enter your History Book or Scrap Book in the History Book/Scrap Book Contest. You can't win if you don't enter! I have seen several bulletins from local associations, and they are great!

Let's not forget the Golda J. Cooper Chapter Achievement Contest. This is your chance to strut your stuff and show the other local associations what you have done this past fiscal year. There is always excitement in the room when the winners are announced. If you missed the deadline to submit your association's Chapter Achievement form for May 2012, start tracking your points earned monthly for next year's contest.

There is no doubt that we have a great time at conferences, however, we also work hard. There are plenty of opportunities to attend educational workshops and network. The Friday Night Reception is time to re-connect with friends and meet the candidates that are running for the office of LSI Treasurer.

I am excited about the future of LSI and what is ahead for us in the coming year. I encourage you to share your knowledge of LSI with others, invite them to your meetings and to attend LSI conferences. We cannot grow if we are not each committed to participating in our local associations, networking and mentoring the next generation of legal professionals. It is up to each of us to set the example by picking up the torch and shedding light on what your local association has to offer.
### Officers and Chairmen Workshops of Legal Secretaries, Incorporated

**May 18, 2012**

**Moderator:** J. Cori Mandy, CCLS, Educational Program Coordinator

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Introductions and Workshop Overview – J. Cori Mandy, CCLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 a.m.</td>
<td>Location: William D. Evans II</td>
</tr>
<tr>
<td>9:00 - 10:15 a.m.</td>
<td>First Session</td>
</tr>
<tr>
<td>10:15 -10:30 a.m.</td>
<td>Coffee Break</td>
</tr>
<tr>
<td>10:30 - 11:45 a.m.</td>
<td>Second Session</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>President’s Roundtable (Incoming/Outgoing Presidents Only)</th>
<th>9:00 a.m. to 11:45 a.m.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moderator:</strong> Lorraine Bettencourt, PLS, CCLS</td>
<td></td>
</tr>
<tr>
<td><strong>Location:</strong> Ventana</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Session</th>
<th>Second Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 a.m. - 10:15 a.m.</td>
<td>10:30 a.m. - 11:45 a.m.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minutes/Notes/Correspondence/Parliamentarian</th>
<th>Newcomer’s Workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moderators:</strong> Mary J. Beaudrow, CCLS, LSI Executive Secretary Julie Edsill, CCLS, LSI Parliamentarian</td>
<td><strong>Moderator:</strong> Heather Edwards, Liaison to Law Practice Management and Technology Section of the State Bar of California</td>
</tr>
<tr>
<td><strong>Location:</strong> Bahia Belle I</td>
<td><strong>Location:</strong> Bahia Belle I</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Treasurer’s Duties/Corporate Office</th>
<th>Governor’s Workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moderators:</strong> Jennifer L. Page, CCLS, LSI Treasurer Catherine Culver, CCLS, LSI Administrator</td>
<td><strong>Moderator:</strong> Christa Davis, LSI Executive Advisor</td>
</tr>
<tr>
<td><strong>Location:</strong> Bahia Belle II</td>
<td><strong>Location:</strong> Bahia Belle II</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ways and Means</th>
<th>Membership/Chapter Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moderator:</strong> Barb Bretherton, San Diego LSA Ways and Means Chair William D. Evans I</td>
<td><strong>Moderator:</strong> Sandra Jimenez, CCLS, LSI Vice President</td>
</tr>
<tr>
<td><strong>Location:</strong> William D. Evans I</td>
<td><strong>Location:</strong> William D Evans I</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Legal Secretary Training/Seminars</th>
<th>Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moderator:</strong> Colleen Young, LSI Legal Secretary Training Chair/Linda Gubba-Reiner, San Diego LSA Legal Secretary Training Chair</td>
<td><strong>Moderator:</strong> Amy Craig, Liaison to San Diego Association of Legal Administrators</td>
</tr>
<tr>
<td><strong>Location:</strong> William D. Evans II</td>
<td><strong>Location:</strong> William D. Evans II</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day in Court/Lunch and Learn</th>
<th>Hosting LSI Conference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Moderator:</strong> Leanna Pierce, LSI Day in Court Chair</td>
<td><strong>Moderator:</strong> Lisa De La O, Assistant Editor, PRC</td>
</tr>
<tr>
<td><strong>Location:</strong> Suite 612</td>
<td><strong>Location:</strong> Suite 612</td>
</tr>
</tbody>
</table>

Please note: Locations are subject to change.
What’s Your APPtitude?

BY DIMETRIA A. JACKSON — SUBMITTED BY ORANGE COUNTY LSA

© Copyright 2012 Orange County Bar Association. Reprinted with permission. This article originally appeared in Orange County Lawyer magazine, February 2012, Vol. 54 No. 2

Do you use apps on your smartphone or iPad? Nowadays, there is an app for almost every aspect of your personal, professional and social life. There are apps to read the New York Times, apps to access Facebook and Twitter, airline apps that allow you to check in for your flight without the need for a physical boarding pass. There are music, sports and entertainment apps as well as apps for shopping, including barcode apps that allow you to scan store merchandise for price comparison.

The prominence and rapidly growing popularity of apps is evidenced by the American Dialect Society naming “app” the word of the year for 2010.

According to Apple, over 18 billion apps have been downloaded by iPhone, iPad and iPod users since the service was launched in July 2008. Not to be outdone, Google reports that Android users have downloaded over 10 billion apps.

So what’s your app aptitude? Perhaps you have a favorite app or you are an ardent app user, always in search of the next app to download. Or maybe you are still using a flip phone and you’ve only heard about apps in television commercials. Whatever your familiarity with apps, the available options will only increase as more and more people purchase mobile devices.

What is an app? The prominence and rapidly growing popularity of apps is evidenced by the American Dialect Society naming “app” the word of the year for 2010. The Society defines app as the “shortened slang term for a computer or smart phone application.” While this definition is reasonably accurate, “apps” are far more.

An app is a type of software that can run on the Internet, your computer, smartphone or other electronic mobile devices. There are two types of apps: native apps and web-based apps. Native apps may be purchased and downloaded from an online app store and stored on your mobile device. These apps are not interchangeable. For example, an iPhone app will not work on an Android smartphone, but the same app may be developed for either device. Web-based apps are available on a variety of mobile devices. They are formatted for use on mobile devices and accessible via a browser. The average cost of an app is approxi-
credit cards payments using your mobile device, then a credit card processor may be an excellent solution. With the Penultimate app, your iPad can be transformed into a legal notepad. Using your stylus or fingertip, you can take notes, make diagrams or sketches on the iPad, which can be saved as a PDF or sent as an email. With the Dropbox app, a file sharing system, lawyers may read and notate client files remotely, thereby creating a paperless office. If you need to email a hard copy document and there is no scanner nearby, there are apps (e.g., TurboScan and ScannerPro) that allow you to scan multiple page documents using your smartphone.

Need help tracking settlement negotiations? A Texas lawyer and mediator has created a free app, called Picture It Settled Lite, that charts each offer and the date and time the offer was made, predicts future offers using an algorithm based on prior offers, and predicts the eventual dollar amount of settlement. This year, a more sophisticated version based on settlement outcomes in thousands of cases, in multiple disciplines and jurisdictions, is anticipated.

For law students, there is an app for California bar review preparation, available for use on your mobile device. BarMax, co-founded by two Harvard law school graduates, was created as an alternative to the more expensive bar examination preparation courses. At $999.99, BarMax is one of the most expensive apps on the market, but if you don’t own an iPhone, they will ship you an iPod Touch to run the app.

There are also numerous apps that provide motivational and inspirational quotations and messages. To commemorate Black History Month, I’d like to share a quote from one of my apps by poet, novelist and Presidential Medal of Freedom recipient, Maya Angelou: “Success is loving life and daring to live it.”

With over one million available apps, there is probably an app to enhance your practice or positively affect your day. And, if you need a break or want to release a bit of stress, you can always download one of 2011’s most popular apps, Angry Birds (a game using a slingshot to launch birds at pigs stationed on or within various structures.) Please note: no animals were actually harmed during the development, download or use of the aforementioned app.
Parliamentary Procedure 101

JULIE EDSILL, CCLS — LSI PARLIAMENTARIAN

This article is my last article as LSI Parliamentarian. As you know, when the change of leadership occurs in May at the annual conference, our new President will appoint a new Parliamentarian. I have thoroughly enjoyed sharing what I have learned these past two years, and thank each of you for the many procedural questions which have inspired my articles. Since “Educating California’s Legal Professionals” is LSI’s tagline, I have kept that in mind in writing my articles. I hope that the knowledge that one has gained from reading each article is being used at the local meetings.

What I want to talk about in this article is the parliamentary procedure we experienced at the February conference in Concord. As those that attended the Board of Governors’ meeting on February 25 know, a member made a proposed Bylaw amendment from the floor without notice, which is allowed for in LSI’s Bylaws. In all fairness, I must tell you that this member did contact me for guidance on making the proposed Bylaw amendment with notice, but I mistakenly misdirected him. The good news is that LSI’s Bylaws provide for both situations, with notice and without notice.

Now, the work does not end with the above vote. Should the proposed Bylaw amendment pass, there is more each association will need to do. What? You ask. Well, are you aware that if a local association’s Bylaws do not provide for student membership that no student membership can happen? Or, if a local association’s Bylaws do allow for student membership and states that no per capita tax will be paid for such member then no per capita tax can be collected.

I am sure you must be sitting there wondering then what are we suppose to do. I am glad you asked. What each association should do is review their Bylaws. Understand what your current Bylaws state about student membership, if any. Each association would need to vote on whether they want to make any changes regarding student membership. Just because LSI’s Bylaws allow for an active member to include a person who is a student, which would require per capita to be paid, does not mean the local association’s have to also allow such.

Each association has their own Bylaws that govern what and how they handle things. If your association allows for student membership in their Bylaws, but states no per capita will be paid by them, then unless you amend your Bylaws to match LSI’s you do not have to pay per capita on that student. Just remember, if you do not pay per capita on a member they do not get counted as an active member.

What I am trying to say is review your Bylaws. Doing this annually is a really good idea, especially when things change at the LSI level. It is the association’s responsibility to confirm that their Bylaws are in keeping of what they are actively doing and not in conflict with LSI’s Bylaws.

At the time of the writing of this article every Governor should have received the “Notice of Proposed Bylaw Amendment” that was sent out according to LSI Bylaws. The Governors were to present the proposed amendment to their local association to approve, or reject the proposed bylaw amendment. The Governor was then to provide in writing to the LSI Executive Secretary within 45 days of the mailing of the notice how their association voted. Failure to notify the Executive Secretary within said 45-day period would be deemed an affirmative vote.

So, I guess my question to each Governor is did you do your job? I hope so.

My parting comment is this, everything that one needs to know is in the Bylaws and Standing Rules, and if one cannot find clear guidance there they should refer to Robert’s Rules. I have stated this in every article that I have written and every report that I have given. It is important! Remember it!
What Great Legal Secretaries Know About Technology

BY JODI LEA ROTHWELL – SUBMITTED BY SAN GABRIEL VALLEY LSA

When I made the transition from paralegal to the Technology Department at Latham & Watkins, all of my friends started to ask me technology-related questions. In the beginning, I was overwhelmed by the whole subject, but now I know a few key things that enable me to do my job effectively and answer at least the majority of the questions I am asked.

What about you? Do you know enough about technology to do your job effectively? If you are like most people, you find technology sometimes overwhelming and often-times confusing. When an IT support person starts rambling off information about RAM, servers and code, it can leave you with a dazed look and scratching your head.

The purpose of this article is to try to sort through the many areas of technology to help you focus on those that are really important for your job, and to encourage you to never stop learning in this important area.

The most important thing to remember is that no one knows everything about technology. No matter what you are faced with on a day-to-day basis, try to remember the following key points:

Remain calm – no matter what the problem is, getting overly excited or angry will not improve the outcome.

Admit when you do not know the answer (and then find out) – do not try to fake it and do not say “that cannot be done” before researching the problem. Both of these approaches will damage your credibility.

Understand that solutions take time – you cannot rush technology. If a macro is needed, it will take time to create it. If a computer has to be switched out because of hardware problems, allow sufficient time for it to be set up properly. Do not promise to implement solutions too quickly. Let the person know that you are doing the best you can and give frequent updates.

Once you master these things, you are ready to learn about four important aspects of technology you need to know:

MICROSOFT OFFICE

For most offices, Microsoft is the core of the software platform. You can never really know enough about Outlook, Word, Excel and PowerPoint. In my opinion, if you are not learning something new in one or more programs in the Microsoft suite, there is something wrong. There is so much you can do beyond the basics in any one of these programs to make your work life better that it behooves you to explore this area on a regular basis.

I would like to make a special plug for Microsoft Excel. When I was a legal secretary, Excel was not used very much by legal professionals. We thought of it as something for “those accounting types!” But today, it is my number one favorite application. I cannot imagine pulling out a calculator or even using one online. Excel can do everything you need with numbers, from simple calculations to sophisticated spreadsheets with graphics. But it is not only great for working with numbers; it can also be an effective project management tool.

When I start any new project, I open a blank Excel document and create separate spreadsheets for all of my subjects. For example, if I am planning a social event for the office, I will have a sheet for the RSVP list, the budget, the menu, the key contacts and anything else that comes up during the project. By using Excel, I can open just one document and have everything I need at my fingertips. If you were to use Word to track the same kind of data, you would have to scroll from page to page to find what you need, which becomes very tedious over time. If you have not already, give Excel a
try and you will be amazed how versatile and useful an application it can be.

APPLE PRODUCTS
If you have been a legal secretary for a long time, you probably think of the world as a Microsoft kind of place, but that is no longer the case. Apple products were once primarily used by graphic artists and other creative types and we typically did not know much about them. In today’s world, you cannot ignore the impact that Macintosh has had on the consumer market. Apple products are so big, in fact, that demand is growing every day for more and more integration into the workplace. When individuals figure out how practical, user-friendly and fun Apple products are, they want to use them more and more.

It is easy to get started. If you do not already have one, get an iTunes account at home. It is free and you do not have to spend a dime to use it. Just insert a personal CD into your computer and when prompted, load your music into iTunes. Or, if you want to just jump into the digital world, enter a credit card into your iTunes account and order music from the iTunes Store. You will be truly amazed at how easy it is to put your music into iTunes and have it available to you on your home computer and any other Apple device you decide to invest in. If you want to start off slow, you can buy an older-model iPod on eBay for very little money to get your feet wet, then graduate to a larger-capacity model. Or if you want to jump into the deep end of the pool, buy an iPod Touch, iPhone or iPad and have access to your music and a whole lot more.

You will never know everything there is to know about Apple software or products, but if you just take some basic steps with music on iTunes, you will have a general understanding of how they work. No doubt, it is going to start permeating your work life, if it has not already.

INTERNET BROWSING
If you have not already mastered this part of technology, you had better hurry and catch up! Learn to bookmark your favorite sites to save time in the future. Then take it one step further and create folders to group favorites together to shorten the list you have to look at.

Mitchell Kapor said, “Getting information off the Internet is like taking a drink from a fire hydrant.” One way to keep from being overwhelmed is to use search parameters that are more specific. For example, if I type “ink stain” into Google search, I get 2,160,000 results. If I type “how to get an ink stain out,” I get 360,000. If I type, “how to get an ink stain out of carpeting,” I get 93,700. You will be amazed at how often you can find exactly what you are looking for rather than being too broad and having to read page after page of information that does not apply to you.

PRESENTATIONS
The ability to create presentations for your attorneys and other legal professionals is a very useful skill. If you are able to create basic slides and condense information into easy-to-follow bullet points for your boss, you will become in demand quickly! Creating presentations is not only useful, but a lot of fun as well. This technology gives you the chance to practice more creative skills, adding color and pizzazz to your day-to-day work. If you have the chance to take classes or do self-study in this area, it is a skill you will not regret having.

FIVE DON'TS WHEN WORKING WITH TECHNOLOGY
Now that we have talked about some basics, it is time to understand what not to do when working with technology.

Don't be afraid of it. Do not think of a computer as a grenade, where one little action could set it off with only seconds to get away before everything blows up. Computers are not like that – I promise! Getting comfortable just trying different things to learn through the experience is what it is all about. You do not have to do it perfectly – just try something and see what happens. If that does not work, try something else. It is very important in our jobs as legal secretaries to demystify technology. Remind yourself – it is just a machine and with a little trial and error, you can figure it out.

Don't be overwhelmed by it. I have worked with a lot of brilliant technologists over the years, all of whom have more knowledge and experience with computers than I will ever have. But I have also learned in talking with them, that no one knows everything about technology. There are too many applications, too many systems, too many new technologies permeating the landscape for any one person to keep up with. It is better for you to focus on what you do know, and then commit to learning more in areas that are imperative for you to be effective in your job.

Don't avoid it. This tendency often follows when you are afraid of technology, but it is important that you do not avoid it. My advice is that you embrace it, instead. How do you do that? You find a technology solution for a problem whenever possible. For example, if you have a request form in PDF format, do not print it out and hand write in the information. Figure out how to type in the information on the screen. Stop writing physical checks and dropping them in the mail; learn how to use online banking and automatic bill pay instead. Every technology system you touch teaches you new skills and feeds your brain with fresh information that will be valuable to you at the office.

Don't miss it. Stewart Brand said, “Once a new technology rolls over you, if you are not part of the steamroller, you are part of the road.” In short, you should try to get in on the ground floor of any new technology. When classes are offered for something new, be the first one to sign up! Typically, once a technology is off the ground, it is harder to get classes and help since everyone else has already been trained. Take advantage of any opportu-
nity to learn and do not wait until the parade has passed you by!

Don’t give up. Frustration is common for all of us in using new technologies. It is just part of the territory. Focus on your victories and not on whatever mistakes you might make. If you get to a point of frustration that seems overwhelming, step away and come back another day — but make sure you do come back! Think about anything new that you have learned in the past. Riding a bicycle, skiing, learning how to cook – these all made you feel inept and confused at first. If you had stopped after your first time, you would not know how to do any of those things today. But you did not give up. You came back the next day – even with some sore muscles and skinned knees – and tried again. Technology is no different. Keep at it and you will get better and better over time.

FIVE DO’S WHEN WORKING WITH TECHNOLOGY

Now that you know the “don’ts” to avoid, consider doing some of the following to help you build your technology skills.

Ask a lot of questions. One way to get on a path of continuous technology learning is to create a list of questions and set up a time to meet with an expert and review them on a regular basis. You would be surprised how many technologists will be willing to help you. (And if they are not, keep looking until you find someone who will!) Sometimes understanding why something happens or how to perform a more advanced function will make all the difference on your outlook about technology.

Set technology learning goals. Think of something you want to learn in a specific period of time and then learn it. For example, this year, I decided my technology focus is going to be on two things: (1) getting my Microsoft Office 2010 Specialist (MOS) certification, and (2) increase my learning on how to create macros in Excel. Each year, I try to focus on one or two topics to add to my existing skills. It can be something as simple as “make my documents look more professional.” Or something practical, like “re-do my secretarial manual using Word styles.” Or, as ambitious as “learn PhotoShop.”

Repeat, repeat, repeat. The key to learning anything new is repetition. After any class where you learn a new technology skill, you must repeat what you have done in class in order for the information to stick. You could go to class after class, but if you do not actually put the information into practice, you will not retain very much of it. One way to do this is to keep a running list of anything new that is taught by your instructor. You only need to use key words to remind you of the area you want to focus on later. When you get back to your desk, go through each of the items you wrote down to solidify the new information into your brain. If possible, do this right after class and again the next day. The more you repeat it, the more it will stick.

Learn how to do it yourself. If you encounter a repetitive task that requires a technology solution, do not delegate it to someone else. Instead, try to figure it out yourself. The help directories that come with most software are usually a great place to start. If that does not work, go online and type your specific question or issue into your browser. You will find a multitude of helpful resources out there. When one is particularly helpful, do not forget to bookmark it in your “Tech Help” folder!

Focus on the skills/tools that your bosses need the most. If you are spending most of your time learning things that interest you, but that have no practical application to your bosses, you are missing the boat. Learn the kind of technology challenges your bosses face and then commit yourself to focusing on those products/projects first. If you become the go-to person for technology solutions, you will increase your value and job security.

INVEST IN YOURSELF

Technology can sometimes be scary, but by tackling it head on and following the above do’s and don’ts, you can grow in your knowledge and skills, eventually mastering many aspects of it. Like anything worth having, it will not be easy, but it will be worthwhile. And you will never regret making the investment in yourself and your future.
LEGAL SPECIALIZATION SECTIONS

Of LEGAL SECRETARIES, INCORPORATED

2011-2012 MEMBERSHIP APPLICATION/ANNUAL RENEWAL FORM

Complete and mail with your check made payable to LSI, for $20 for each section, or a total fee of $75 per year to join all SIX sections simultaneously if an LSI Member, or $40 for each section or a total fee of $150 per year to join all sections simultaneously if joining as a non-LSI member.

Mail to: Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator
5534 Blackbird Drive, Pleasanton, CA 94566

Enclosed is payment of my dues for the fiscal year 8/1/11 through 7/31/12 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

Method of Payment: Check, payable to “LSI,” enclosed □ VISA □ MASTERCARD □ AMEX □
Credit Card Information: Number _______________________________ Expiration Date: Month _____ Year _____
Name on Credit Card: _______________________________ Card Verification Number ____________

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS $25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

NEW RENEWAL

Civil Litigation
Criminal Law
Family Law
Law Office Administration
Probate/Estate Planning
Transactional Law

(PLEASE PRINT OR TYPE)

NAME: MR./MRS./MS. ___________________ PLS/CCLS/CLA/PARALEGAL
ADDRESS/CITY/STATE/ZIP ________________________________
LOCAL ASSOCIATION: ________________________________ LSA/LPA
RESIDENCE PHONE ( ) ___________________ BUSINESS PHONE: ( )
E-MAIL ADDRESS(ES): ________________________________
EMPLOYER: ________________________________
EMPLOYER’S ADDRESS: ________________________________

PREFERRED MAILING ADDRESS: □ HOME □ OFFICE □ EMAIL
YEARS OF LEGAL EXPERIENCE: ________________________________
SPECIALTY: ________________________________
FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):

MAY 2012 | 13
Certifying copies of vital records is prohibited by Notaries, but a Notary may certify an affidavit of a person requesting a certified copy of a birth or death certificate. (Only a Bureau of Vital Statistics officer should certify a birth certificate or other vital public record, and only a county recording official should certify a recordable instrument or a copy of a deed.)

9. Does a document need to be signed in my presence? It depends. For Acknowledgement certificates, the documents do not have to be signed in the Notary’s presence. Yet, an Acknowledgement certificate indicates that the signer has personally appeared before the Notary and acknowledged that the document was freely signed.

Jurat certificates, on the other hand, require a signer to personally appear before the Notary, to be identified by the Notary and sign the document in the Notary’s presence, and that the Notary gave the signer the oath or affirmation.

10. Can I notarize for a family member? It depends. California law does not explicitly prohibit notarizing a document for family members. However, one must be very careful not to violate statutes where there is a direct beneficial interest, i.e., notarizing for spouses in states with community property laws. In addition, a Notary must avoid notarizing a document when emotional interests are at stake, whereby the Notary might act impartially.

Although a Notary has no direct beneficial interest in the document to be notarized, notarizing for a relative could subject the document to a legal challenge. This would occur if the other parties in the transaction alleged that the Notary acted impartially.

Lastly, it is important to continue to study and learn the duties of a notary public. Several ways include joining the National Notary Association (Tel: 1-800-876-6827, www.NationalNotary.org) (National Notary Association: California Notary Public Practices and Procedures, p. 2), joining a local notary association, and keeping in contact with other California notaries.

Thus, after becoming a notary public, it is important to (1) apply your knowledge, (2) learn the 10 Most-Asked Questions (National Notary Association, 2010, pp. 9-13), and (3) continue your notary study.

REFERENCES


Social Networking Research & Investigations Continued from page 33

Lie, exaggerate and/or embellish their activities and credentials when hiding behind a computer screen. Relying on this information without independent investigation and verification is not only foolish but also irresponsible.

In addition, some subjects involved in litigation or a claim are now posting false information IN SUPPORT of their lawsuit or claim. This is an area that is growing in popularity, and should be strongly considered when the subject’s postings appear to support his/her claim, when other evidence would appear to contradict it.

There is also the common practice of OTHERS posting false information about subjects as a form of retribution or retaliation. This can also cause the researcher to be misled by false postings, and go down the wrong investigative path.

In conclusion, social media sites can be a blessing or a curse when conducting research and investigations. Like going on an archeological expedition, you can find the “holy grail” of evidence that will make you a very popular person with your boss or client. Or, it can simply be a pile of dirt or a worthless relic, after a lot of tireless digging.

Disclaimer: The information contained in the article should not be considered legal advice.
William A. Rutter  
October 21, 1928 - February 2, 2012

William A. Rutter ("Bill") passed away peacefully Thursday evening, February 2nd, 2012, with his wife Sally, the love of his life, and all of his children, by his side.

Bill received his B.A. degree from the University of California at Santa Barbara; his M.P.A. degree from the University of California at Los Angeles; and his J.D. degree from the University of Southern California School of Law, where he was Associate Editor of the Law Review and a member of the Order of the Coif. As a youth, he was an Eagle Scout; and as a young adult, Bill served our country during the Korean War.

Bill shared his knowledge and skills in almost every facet of the legal profession: as a practitioner, as a law school teacher, as a publisher, and as an author. For 15 years following his admission to the Bar in 1955, Bill maintained a general civil law practice, specializing in business litigation and appellate work. At that point, he withdrew from the practice of law and began his career as a visionary and trail blazer in legal education. Since then, Bill devoted his life to legal education and publishing law study aides and Practice Guides.

In 1979, he founded The Rutter Group, which grew under his leadership to become a leading and most highly respected provider of continuing legal education publications and programs in California and nationwide. The standards he set through the Rutter Group Practice Guides have been imitated but never matched.

Bill also wrote and published all of the original Gilbert Law Summaries, the most popular study aides for law students, and founded the BAR/BRI Bar Review, which became the largest Bar Review course in the country.

In 1996, Bill joined a very select group of legal scholars when the California State Bar Board of Governors honored him with the Bernard E. Witkin Medal recognizing those "who have altered the landscape of California jurisprudence." This honor particularly singled Bill out as an "extraordinary contributor to the California legal community."

Bill was also a very quiet and private philanthropist. Among his countless goodwill gestures, he and his wife Sally, for almost 50 years, sponsored dozens of foster children in many countries. They underwrote a French Horn Chair for the Los Angeles Philharmonic. And when the Philharmonic reached out to them to sponsor one of the four Wagner Horns the orchestra desperately needed, they provided all four.

Tributes have poured in, including the following:

"Bill Rutter was a giant of the law . . . Bill was also a dear and loyal friend of many, many years." Justice Ming W. Chin, California Supreme Court

"The contributions of Bill Rutter to the practice of law over the past half century cannot be overstated . . . Because of Bill's efforts, even a sole practitioner today has the ability to quickly deal with otherwise unfamiliar issues. He well deserves his place in the pantheon of legal scholars and leaders." Justice H. Walter Croskey, California Court of Appeal

"Bill Rutter's contributions to the legal profession and, through it, to justice and the administration of justice are immeasurable, and indelible. He altered the course of legal education forever . . . And he did his work with enormous skill and energy, complete integrity, and grace." Presiding Justice Norman L. Epstein, California Court of Appeal

"Bill's passing marks the end of a legal era. He is one-of-a-kind." Justice Rebecca A. Wiseman, California Court of Appeal

"Bill was an outstanding legal scholar. His knowledge of the law was so broad and infused all of The Rutter Group publications . . . Bill was also the kind of human being we should all aspire to emulate. He earned the respect of our entire legal community." Justice William F. Ryland, California Court of Appeal

"Working with Bill was always such a pleasure. He was a brilliant man who had a unique way of explaining complex legal issues in concise, understandable language, and he was so kind . . . His work is a lasting legacy." Presiding Judge Lee Smalley Edmon, Los Angeles Superior Court

"Bill left us with impossibly huge shoes to fill. We will not let him down. We will miss him dearly." Linda Diamond Raznick and Kalman S. Zempleny II, The Rutter Group

Bill is survived by his adoring wife Sally, his children Paul, Joanna, Barry and Charlie, and their respective spouses, 13 grandchildren and 4 great grandchildren. And the "other love of his life," Missy, Bill's rescue Westie. He was the most loving husband, father, grandfather and greatgrandfather to all of them.

A public Memorial Service celebrating Bill's life was held on February 18, 2012 at the Westwood United Methodist Church in Los Angeles, California. In lieu of flowers, gifts in honor of Bill Rutter can be made to the Los Angeles Philharmonic Association - Music Matters.
California Certified Legal Secretary — Dates And Deadlines You Need To Know

MICHELLE RODGERS, CCLS — CHAIRMAN OF THE CCLS CERTIFYING BOARD AND TERRIE QUINTON, CCLS — LSI CCLS CHAIRMAN

One section of the California Certified Legal Secretary Exam is “Legal Computations” which includes calendaring. Here is your first exercise – calendaring all of those dates and deadlines associated with the CCLS program. We suggest that you make a note of these dates and deadlines (perhaps in Outlook or whatever calendaring program you have in your office) to ensure that you are in compliance and that there are no surprises.

TAKING THE EXAM
March and October - The CCLS Exam is given twice a year in March and October. The Exam date is generally the third Saturday of those months.

60 Days Before Exam Date – The deadline to send in applications for the CCLS Exam is 60 days prior to the Exam date. The application must be received by the Certifying Board no later than the deadline. If the deadline lands on a weekend or a holiday, it is still timely for it to be received by the next business day. If you need to send your application via overnight mail, please contact the Certifying Board to obtain the address to which you should send the application. These deadlines apply to those who are retaking either the full Exam or portions of the Exam.

45 Days Before Exam Date – The Certifying Board will send a confirmation of receipt of your application to take the Exam.

30 Days Before Exam Date – Late applications to take the Exam may be accepted up to 30 days prior to the Exam date, if space is available.

Again, the application must be received by the Certifying Board by no later than the deadline. Please remember that if you submit an application late, you must include the applicable late fee. Again, if you need to send your application via overnight mail, please contact the Certifying Board for an address. These deadlines apply to those who are retaking either the full Exam or portions of the Exam.

30 Days Before Exam Date – The Certifying Board will send an email providing you with your Exam location, names of your proctors and Exam schedule, along with other pertinent information you will need for Exam day.

14 Days Before Exam Date – If you are unable to sit for the Exam on the date you have applied for, you must notify the Certifying Board no later than two weeks before the Exam that you will be deferring. You must send in your request to defer, along with the applicable fee. If an emergency occurs and you are not able to submit a timely request to defer, please contact the Certifying Board Chair as soon as possible to request an exception.

AFTER THE EXAM
6 Weeks After Exam Date – Results of the CCLS Exam will be emailed to examinees within 6 weeks after the Exam.

20 Days After Exam Results Sent – Within 20 days after the Exam results are sent to examinees, those examinees who did not pass the Exam may submit a request to review those portions of the Exam that they did not pass.

...Continues on page 20
**LEGAL SPECIALIZATION SECTION SEMINARS**

Annual Conference – May 2012 - Bahia Resort, San Diego
Host: Imperial County LPA and San Diego LSA

**REGISTRATION FORM - DEADLINE IS FRIDAY, May 11, 2012**

Registration MUST be RECEIVED by each Section Leader on or before the deadline.

Please make advance reservations so materials may be prepared. Please check appropriate boxes below.

Mail, Fax or E-Mail a copy of this form to each corresponding Section Leader.

Send a self-addressed, stamped envelope if you wish confirmation of your reservation.

**PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"**

<table>
<thead>
<tr>
<th>LSI SECTION MEMBER:</th>
<th>LSI NON-SECTION MEMBER:</th>
<th>NON-LSI MEMBER:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free with Advanced Reservations</td>
<td>$10.00 with Advanced Reservation</td>
<td>$15.00 with Advanced Reservation</td>
</tr>
<tr>
<td>$5.00 at the Door/After Deadline</td>
<td>$15.00 at the Door/After Deadline</td>
<td>$20.00 at the Door/After Deadline</td>
</tr>
<tr>
<td>Handout Only: $5.00</td>
<td>Handout Only: $10.00</td>
<td>Handout Only: $15.00</td>
</tr>
</tbody>
</table>

**TRANSACTIONAL LAW:**

Topic: Consumer Law and the Secrets of Car Buying
Speaker: John W. Hanson, Esq.

☐ I will attend ☐ Section Member ☐ Non-Section Member
☐ Non-LSI Member ☐ Handout Only

Send to: Belinda Owens, Transactional Law Section Leader
3163 Easy Street, San Diego, CA 92105
(W) 858-410-8951 (C) 619-281-9323 (F) 858-410-7678
Email: bowens0913@aol.com

**PROBATE/ESTATE PLANNING:**

Topic: To Inventory and Beyond
(From Inventory to Distribution in a Probate Estate)

Speaker: Patricia Miller, PLS, CCLS and Mary Rocca, CCLS

☐ I will attend ☐ Section Member ☐ Non-Section Member
☐ Non-LSI Member ☐ Handout Only

Send to: Linda Moore, CCLS, Probate/Estate Planning Section Leader
Stutz, Artiano, Shinoff & Holtz
2488 Historic Decatur Road, Suite 200
San Diego, CA 92106
(O) 619-232-3122 x404 (F) 619-232-3264 (C) 619-723-5336
Email: lmoore@stutzartiano.com

**FAMILY LAW:**

Topic: How Using A Licensed Private Investigator Can Help Your Legal Cases
Speaker: Dan Krotzer, Knox Attorney Service

☐ I will attend ☐ Section Member ☐ Non-Section Member
☐ Non-LSI Member ☐ Handout Only

Send to: Judith Williams, Family Law Section Leader
2368 Lincoln Street, Suite A, Orville, CA 95966
(O) 530-534-8973 (F) 530-534-6551
Email: PWPLGL2@yahoo.com

**CRIMINAL LAW:**

Topic: Introduction into the Federal Criminal Justice System
Speaker: Francisco J. Sanchez, Esq.

☐ I will attend ☐ Section Member ☐ Non-Section Member
☐ Non-LSI Member ☐ Handout Only

Send to: Linda Lane, Criminal Law Section Leader
P. O. Box 12582, La Crescenta, CA 91224
(H) 818-248-0739 (C) 818-434-6600
Email: llane44@yahoo.com

**CIVIL LITIGATION and LAW OFFICE ADMINISTRATION (joint seminar):**

Topic: Ethics
Speaker: Patrick J. Kearns, Esq. of Wilson, Elser, Moskowitz, Edelman & Dicker, LLP

☐ I will attend ☐ Section Member (of either Civil Litigation Section or Law Office Administration Section) ☐ Non-Section Member
☐ Non-LSI Member ☐ Handout Only

Send to: Denise Aguilar, CCLS, Civil Litigation Section Leader
8279 Philodendron Way, Buena Park, CA 90620-2120
(H) 714-670-0215
Email: dagular57@att.net

---

**Name:**

**Address/City/State:**

**Phone: (Work) (Home) Local Assn.: LSA/LPA**

**Method of Payment:** ☐Check ☐Credit Card Number ___________________________ Expiration Date: ___________________________

**Name on Credit Card:** ___________________________ **Type of Card:** Visa M/C AmEx Card Verification ___________________________

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS $25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 7.5 hours each, by the State Bar of California.
5 Easy Things You Can Do To Protect Your Family

ROBERT MANSOUR — SUBMITTED BY RIO HONDO DISTRICT LPA

If you don’t have an estate plan for your family, there are five things you can do for free to make sure you at least have some basic tools in place.

ONE
If you don’t even have a will, download a free will form from the California Bar Association (www.CalBar.org). It’s better than nothing.

TWO
Check your 401K’s, IRA’s and Life Insurance policies to make sure the correct beneficiaries are designated. In many cases you might be surprised who is actually listed (or perhaps not listed) as your beneficiary. This doesn’t happen by magic or good intentions. You have to call the company managing that particular asset and ask them for a beneficiary designation form. Make sure you name “back up” beneficiaries, also known as secondary or contingent beneficiaries. Also, make sure you ask the company what happens if a co-beneficiary dies. Does their share go to that beneficiary’s children, or does their share go to the remaining designated persons on the form. Also, if you have minor children, you may not want them listed as direct beneficiaries. Life insurance should not be made payable to minors in most cases.

THREE
Who is authorized to make health care decisions on your behalf if you are unable to do so? Just because you are married, your spouse isn’t automatically entitled to do this. This is a mistake many married people make they assume their spouse is in charge and authorized to act simply by being married to them. It doesn’t work that way. Make sure you have an Advance Health Care Directive which allows someone to legally act. While most lawyers provide this as part of a comprehensive estate plan, you can at least get a free entry-level form from the California Attorney General’s website. Again, it’s entry-level but it’s better than nothing.

In many cases you might be surprised who is actually listed (or perhaps not listed) as your beneficiary. This doesn’t happen by magic or good intentions.

FOUR
Try not to own anything jointly with anyone other than your spouse. Make sure you think it through and talk to professionals before making that decision. Joint ownership seems like a good idea at first blush but it’s one of the leading causes of “unintentional” disinheritance. Also, consider a living trust instead of owning assets jointly with your spouse.

FIVE
Finally, review your insurance policies. For families with few assets, there is no better way to infuse a whole bunch of cash to help to pay for college and the mortgage. Also, for auto policies, make sure you have plenty of uninsured motorist coverage. There are so many people driving without adequate insurance. 
Getting The Right Things Done When Your World Is Crazy Busy

VICKI VOISIN, ACP

It's no secret that we live in a crazy busy world. No matter how much you do, your “to do” list is still a mile long and you always run out of day before you run out of list. You’re forever scrambling just trying to just keep up. It’s probably safe to say that you’ve probably given up on staying ahead.

And that’s just at work...add your personal and social obligations and it’s no wonder you’d like to just hide under the covers some mornings and skip the rat race.

SO HOW DO YOU GET THINGS DONE? AND NOT JUST ANY OLD “THINGS” BUT THE RIGHT THINGS?

First, clear your mental desk. Take 10-15 minutes and write down everything that you need to do. This is everything that pops into your head, from the trial brief to your friend’s baby gift to your mother-in-law’s birthday card to getting a plumber in to fix that leak. These are just examples -- you get the idea.

Second, grab a blank piece of paper or spiral notebook. Pick 7 important things from your “everything” list. Write them down...and actually write them, don’t type them.

Third, do those 7 things in the order you listed. When you finish with one, move on to the next, and then the next, working through all 7 one by one.

Fourth, do the same thing tomorrow. And the day after and the day after that. If you don’t finish something today, it can be moved to tomorrow’s list if you still think it’s important. If its importance has changed, forget it. Just because it’s on the list one day doesn’t guarantee it a place on tomorrow’s list.

Fifth, use a timer. Once you get this approach down pat, add a timer to your routine. For example, this newsletter is always on my “To Do” list so that it gets done in parts and doesn’t end up being an all day project. I allow 30 minutes for each part. So when “write newsletter” shows up on my list each day, I set my timer for 30 minutes and work on it for that chunk of time. This keeps me totally focused and I often get the newsletter done in less time.

One more thing: To tame the always present email, I check it at set times each day or between tasks (from above) if I’m expecting something important.

I also ‘book’ an hour into my calendar for each day when nothing’s planned. This time is used for whatever comes up and, if nothing comes up, I choose whether to do something else from my list, take a long walk, write an article or, if I’m really ambitious, make a really nice dinner for The Don...whatever I’m inspired to do.

The above makes three assumptions:

1. You have written goals and objectives AND are determined to achieve them.
2. You understand that perfection and procrastination may derail your ‘To Do’ list and you avoid them as much as possible.
3. You delegate anything that isn’t in your best interest.

Time Management is a hot topic. This article gives you the simplest system for managing your time: write it down and do the things you’ve written down. Everything else is just noise that clutters your brain.

Your challenge is simple: Try the 5 steps above. As written. Give it three weeks and see how much more you’re getting done every day.
Dates And Deadlines You Need To Know... Continued from page 16

60 Days Prior to Next Scheduled Exam Date - Exam reviews must be completed no later than 60 days prior to the next scheduled Exam date. The Certifying Board will contact you to schedule the Exam review, however, it is the examinee’s responsibility to follow up to ensure the review occurs by this cut-off.

LSI Annual Conference - At LSI’s Annual Conference each year, a special luncheon is held on Saturday to honor those new CCLSs who passed the Exam during the last fiscal year.

RECERTIFICATION
Every 3 Years - CCLSs must recertify every 3 years, during the month that they passed the Exam (either March or October).

March 31/October 31 - Applications for Recertification must be submitted to the Certifying Board by the last day of the month in which the CCLS is to recertify. If you are unable to meet this deadline, you must contact the Certifying Board as soon as possible to request an extension, which may be granted upon approval of the Certifying Board. The Certifying Board will send out reminders to CCLSs needing to recertify, however, it is ultimately the CCLS’s responsibility to ensure they submit their Application for Recertification, along with the appropriate fees and certificates, in a timely fashion.

60 Days from Returning to California - A CCLS who moves out of state, upon notifying the Certifying Board, can put a hold on continuing education requirements; however, upon returning to California, the CCLS must notify the Certifying Board within 60 days of their return and continue with the recertification requirements.

Immediately - A CCLS who is no longer working in the legal field may, upon notifying the Certifying Board, change their status to inactive and put a hold on continuing education, and cease using the CCLS designation during this time. If the CCLS returns to the legal field, they must notify the Certifying Board immediately and continue with their educational and recertification requirements in order to once again use the CCLS designation.

Immediately - In order to keep the CCLS records current (and to keep those Recertification reminders coming), notify the Certifying Board immediately if your address changes. The form is available on LSI’s website.
THE IDEAL TRAINING MANUAL FOR NEW STAFF!

The Problem: Training new law office staff members is time-consuming and expensive. The adequacy of the training is often dependent on the ability of the existing staff. Loss of key personnel may make it impossible to train and supervise less experienced staff.

The Solution: A system for training new staff and a reference source for all existing office personnel. The Law Office Procedures Manual, created by Legal Secretaries, Incorporated, provides everything you need to know about the forms, rules and procedures required in a law office.

STEP-BY-STEP GUIDANCE: The Manual covers each major area of law practice.

FORMS: The Manual includes the major Judicial Council forms, plus typical attorney-drafted forms. Sample forms are filled out to illustrate common applications.

UP-TO-DATE: The Manual is updated twice a year to include revised Judicial Council forms and other changes in applicable rules and procedures.

CONTENTS

- Court Structure
- Civil Procedure
- Local Rules
- Discovery
- Unlawful Detainer
- Real Estate
- Criminal
- Family Law
- Adoptions
- Probate
- Conservatorships and Guardianships
- Corporations and Limited Liability Companies
- Workers' Compensation
- Miscellaneous: Practice Tips; Service and Proof of Service; Fax Filings; Verifications; Substitution/Association of Counsel;
- Notarial Acknowledgments; Recording Laws; Forms of Address; U.S. Postal Service Addressing Standards and State Code Abbreviations; Transcription and Proofreading; Alphabetical Filing Rules; Calendars; Legal Abbreviations and Jargon; Office Procedures; Reference Materials
- Glossary

LAW OFFICE PROCEDURES MANUAL ORDER FORM

<table>
<thead>
<tr>
<th>TITLE</th>
<th>PRICE</th>
<th>QTY.</th>
<th>SUBTOTAL</th>
<th>TAX</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Law Office Procedures Manual</td>
<td>$140 (LSI Members-Only Price)</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Law Office Procedures Manual</td>
<td>$175 (Nonmembers Price)</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ MY PAYMENT IS ENCLOSED. 45-day return privileges apply.
☐ PLEASE SEND ON 45-DAY APPROVAL. If I decide not to keep this title, I will return it within 45 days at my own expense.

Your subscription(s) to future Updates will be entered automatically. If you do not wish to receive automatic Updates, check box below.
☐ Do not send future Updates. I understand this product has limited value without Updates. (Cost of 2011 Update #2 was $50.)

NAME __________________________________________________________ PHONE (_____) (____) (____)
E-MAIL ADDRESS ______________________________ STATE BAR NUMBER ______
FIRM ___________________________ SUITE ______
ADDRESS ___________________________ CITY ______ STATE ______ ZIP ______
☐ Enclosed is my check for $ ___________ payable to THE RUTTER GROUP
☐ Charge $ ___________ on my ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS

CREDIT CARD NUMBER _________ EXP. DATE _______
SIGNATURE __________________________________________

Mail to THE RUTTER GROUP
15760 Ventura Blvd.
Suite 630
Encino, CA 91436
Or fax to 1-818-377-7839

To order or for more information, call 1-800-747-3161 (ext. 2)
LEGAL SECRETARIES, INCORPORATED
AUGUST 2012 FIRST QUARTERLY CONFERENCE
AUGUST 17, 18 & 19, 2012
BLUE RIBBON FAIR
Hosted by:
ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION AND
LIVERMORE-AMADOR VALLEY LEGAL PROFESSIONALS ASSOCIATION
HILTON PLEASANTON AT THE CLUB, PLEASANTON, CALIFORNIA

CONFERENCE REGISTRATION FORM

Name (On Badge): ____________________________________________________________
Mailing Address: ___________________________________________________________
City/State/Zip: _____________________________________________________________
Home Phone: __________________________ Work Phone: _________________________
E-mail Address: ___________________________________________________________
Local Association: __________________________________________________________

(Full Name)

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE:  PLEASE CHECK IF YOU ARE:
□ State Officer: __________________________________________ □ Governor  □ CCLS □ PLS
□ State Chairman: __________________________________________

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH):
Postmarked on or Before July 27, 2012 $108.00
Postmarked July 28, 2012 or later $118.00

INDIVIDUAL TICKETS:
Registration by July 27, 2012 ______ @ $15.00 $_______
Registration (After July 27, 2012) ______ @ $25.00 $_______
Officer/Chairmen Luncheon** ______ @ $25.00 $_______
**Friday Luncheon For State LSI Officers and Chairmen only**
Welcome Reception (Friday) ______ @ $20.00 $_______
Governor’s Luncheon (Saturday) ______ @ $25.00 $_______
President’s Luncheon (Saturday) ______ @ $25.00 $_______
Membership Luncheon (Saturday) ______ @ $25.00 $_______
Saturday Night Banquet ______ @ $52.00 $_______
Sunday Brunch ______ @ $27.00 $_______

TOTAL AMOUNT PAID: $____________

Check All That Apply: Require Vegetarian Meal: ______ Food Allergies: _____________________

Please Make checks payable to and mail to: *ACLSA/LAVLPA 2012 CONFERENCE FUND*
Christa Davis, Registration Chair, 19827 Alana Road, Castro Valley, CA 94546

For General Information Contact Co-Conference Chairmen:
Cheryl L. Kent, PLS, CCLS - (925) 837-0585 Clkccls@comcast.net - Livermore-Amador Valley LPA
Mary S. Rocca, CCLS - (510) 865-0473 Marysrocca@aol.com - Alameda County LSA

NO REFUNDS AFTER JULY 27, 2012
LEGAL SECRETARIES, INCORPORATED
AUGUST 2012 FIRST QUARTERLY CONFERENCE
AUGUST 17, 18 & 19, 2012
BLUE RIBBON FAIR
Hosted by:
ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION AND
LIVERMORE-AMADOR VALLEY LEGAL PROFESSIONALS ASSOCIATION

HOTEL REGISTRATION INFORMATION

Accommodations:
- Single/Double $72.00 per night
- Triple/Quad $72.00 per night

Taxes, Fees, Assessments: 8.05%; Tourism Tax: $2 per night
No checks accepted.

Check In: 3:00 p.m. Check Out: 12 Noon
Parking: Complimentary

To make reservations (by telephone or online):

Group Name: LSI Quarterly Conference
Group Code: LSI
Telephone: (925) 463-8000

For General Information Contact Co-Conference Chairmen:
Cheryl L. Kent, PLS, CCLS - (925) 837-0585 - Clikccls@comcast.net - Livermore-Amador Valley LPA
Mary S. Rocca, CCLS - (510) 865-0473 - Marysrocca@aol.com - Alameda County LSA

Hilton Pleasanton at The Club
7050 Johnson Drive
Pleasanton, CA 94588
Tel: 925-463-8000
Fax: 925-463-3801

Oakland International Airport:
20 miles from the hotel - 17 minutes drive time.

Directions from Oakland International Airport: Take 880 South to 238 East to 580 East, exit at Hopyard and turn right onto Owens, then turn right onto Johnson Drive, the hotel is on the left.

Easy access to BART
We offer complimentary shuttle service to and from the Dublin/Pleasanton BART station. Contact front desk for reservations. For more information about BART, visit their website at www.BART.gov.

Club Sport
Club Sport offers state-of-the-art equipment to meet your every need during your stay. Complimentary passes for Hilton Pleasanton hotel guest.

ROOM RESERVATION CUTOFF: AUGUST 2, 2012
The Power Of Networking
Overcoming Fear And Making Friends

ANA FATIMA COSTA

Ana Fatima Costa began her career as a freelance court and deposition reporter in 1979 after passing the rigorous California Certified Shorthand Reporter exam just two weeks after passing the national Registered Professional Reporter exam. She worked in superior and federal courts in the Alameda, Contra Costa, Napa, San Francisco and Santa Clara counties. During her reporting career, she produced transcriptions in over 900 civil and criminal law matters, as well as hearings, arbitrations and medical peer reviews. Later, she managed the San Francisco office of a global reporting agency and now provides litigation and customer service support for hundreds of clients nationwide at Barkley Court Reporters. An active member of the legal community, Ana is Governor of Mt. Diablo Legal Professionals Association, a member of Bay Area Legal Forum, and sits on the advisory board of San Francisco State University’s Paralegal Studies Program. You can reach her at anac@barkley.com.

Courage, from the Old French word coeur, meaning "heart," is defined as:
1. The ability to do something that frightens one.
2. Strength in the face of pain or grief.
3. Knowing there is almost certain failure but doing it anyway.
4. The ability to confront pain, fear, humiliation, or anything else a person would naturally stay away from.

In 1993, I was admitted to the hospital with pounding headaches, nausea and dizziness. The doctors said it was encephalitis, possibly due to a mosquito bite in 1985. Nine years later, my speech began to slur, and two years ago, I was diagnosed with a rare condition called abductor spasmodic dysphonia. My voice comes out haltingly at times or it cracks in the middle of a word. Yet I press on anyway when I have something to say. Even if I have to repeat myself.

NETWORKING INTRODUCTION
My introduction to networking came from the Portuguese festas that my father hosted to bring in income. The idea of a festa is to preserve the Portuguese cultural and religious traditions. People would travel hundreds of miles to eat, dance, drink wine and reconnect with people from all over California and Nevada. As the master of ceremonies, my father loved seeing everyone have fun.

Through networking I learned to move beyond my self-consciousness and develop self-confidence in social settings.

From the age of 9 through 19, I was surrounded by hundreds of people several times a year, and the Costa family was the center of attention. To my chagrin, my father would call my siblings, mom and me to the stage to introduce us at every festa. It was such a relief to get off that stage and the public eye! But my dad loved it, and the public loved him. He was at ease in any social setting. Not me. I was terrified. It was many years later when I finally took the plunge into overcoming my fears.

People who know me believe that I know everyone, and sometimes it feels like that to me, too. Nearly every time I walk down the streets of San Francisco, sit in a restaurant, or get on BART, I see someone that I know. It is a good feeling, like running into friends everywhere you go.

Yet no one would know that deep down I am actually a very shy person. Or, at least I used to be. Everything started to change in 2006, when I decided to join the local chapter of the largest networking organization in the world.

It’s primary objective is to educate its membership in ways to market and grow their businesses through referrals, and to offer support and educational workshops to assist members in being successful. Through networking, I learned to move beyond my self-consciousness and develop self-confidence in social settings.

As I became more comfortable with the people and schedule, I relaxed and learned that I could be funny. In fact, there were times it felt like my father (who had passed away in 2001) was standing next to me, smiling and saying, "See? It’s not so bad, huh?" In fact, I started visiting other chapters and met even more people and made more friends.

TRANSFORMING FEAR INTO CONNECTION
As Governor of Mt. Diablo LPA, I have spoken up at conferences, either to ask clarifying questions or to voice my viewpoint about an item of discussion. Although my heart still pounds...
when I speak in front of large groups, I take a deep breath and plunge in anyway.

The essence of networking is connection:
- Talking and listening to others - learn about one another’s lives, families, dreams, hopes.
- Finding things or people in common - you know the same person, or both like to knit.
- Exchanging information - there’s an opening in a law firm that you’ve wanted to work at.

The person across the table who is frowning may feel as uncomfortable as you, or maybe recently had a death in the family, lost their job, doesn’t feel good or something happened to their kid. Unless you talk to them, you’ll never know, and you may make judgments about them, when the whole time they would love to connect with someone.

Everyone likes to be heard and seen, so ask someone about their work, their association, where they’re from. We also like to feel appreciated and acknowledged - compliment them on their jewelry, clothing or shoes. Everyone has a story and you might just make a great friend.

A wonderful result of meeting so many people has been my ability to find speakers for Bay Area Legal Forum’s conferences and workshops, as well as for Mt. Diablo LPA and other groups. This is where I met Tamara Steele, the attorney who gave the inspirational talk during Sunday brunch at LSI’s 3rd Quarterly Conference in Concord, hosted by Mt. Diablo LPA.

Through networking, I have discovered that what makes me happiest is introducing friends and colleagues to one another - someone who offers a service or who has expertise in some area to someone needing help or seeking a service. Nothing brings me more joy (outside of my beautiful sons) than a match that works for the good of all.

So, at the next conference, gently nudge yourself past your comfort zone and reach out to someone you don’t know. A smile and simple, “Hi, I’m (insert name here)” may feel awkward at first, but the more you do it, the easier it gets. Like learning a new language.

Take a risk - you won’t regret it!
Now That You Are A Notary, What’s Next?

HANNALORE DIETRICH – SUBMITTED BY SANTA CLARA COUNTY LPA

Once you have obtained the status of “Notary Public,” it is important to (1) apply your knowledge, (2) learn the 10 Most-Asked Questions (National Notary Association, 2010, p. 9), and (3) continue your notary study.

In order to apply your knowledge, see if you can identify the authorized notarial acts with the descriptions listed below:

<table>
<thead>
<tr>
<th>Acknowledgements</th>
<th>Proofs of Execution</th>
<th>Oaths &amp; Affirmations</th>
<th>Copy Certifications</th>
<th>Jurats</th>
<th>Protests</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A Notary certifies that a copy of a document is true and accurate. This procedure may only be used for powers of attorney and Journal line entries.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. A subscribing witness takes the acknowledgement of and an instrument was not received.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. A written statement by a Notary that payment on an instrument was not received.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. A Notary certifies that the signer personally appeared, was positively identified, signed in the Notary’s presence and took an oath or affirmation.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. A solemn, spoken promise of truthfulness made in the presence of the Notary.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. A Notary certifies that the signer personally appeared, was positively identified and acknowledged signing the document (National Notary Association: Lesson 1: The Notary Public Office, 2010, p. 9).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After applying your knowledge as mentioned above, you need to learn and commit to memory the 10 Most-Asked Questions (National Notary Association, 2010, p.9). Answer the 10 questions below, using the following answers:

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Usually</th>
<th>It Depends</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Can I notarize signatures on Faxes or photocopies of documents?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Can I notarize a Will?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. May I notarize for customers only?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Can I notarize a photograph?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. What if there is no room for my seal or if it smears?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Can I notarize for a family member?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Does a document need to be signed in my presence?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Can I notarize a document in a language I cannot read?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Can I notarize for a stranger with no identification?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A BRIEF DISCUSSION OF THE 10 MOST-ASKED QUESTIONS (NATIONAL NOTARY ASSOCIATION, 2010, PP. 9-13) FOLLOWS:

1. Can I notarize a Will? It depends. If clear instructions and a notarial certificate are provided, a Notary can notarize a Will. A Notary is not to give advice and should refer the signer to an attorney if questions arise.

A holographic (handwritten) Will may be voided if notarized, as courts have occasionally held that any writing on the document other than the testator's invalidates the Will. In addition, would-be testators who draft their own wills without legal advice may notarize them, thinking this will make the Will valid and legal. Yet the Wills may be worthless, as the would-be testators omit important information or fail to obtain the correct number of witnesses.

2. Can I notarize for a stranger with no identification? Yes. If a signer cannot be identified by identification documents, a Notary may rely upon the oath or affirmation of two credible identifying witnesses who are strangers to the Notary or of one personally known credible identifying witness. (Every credible witness must present a valid state-approved ID to the Notary—effective January 1, 2008.)

In a Proof of Execution, a subscribing witness may only be identified upon the oath or affirmation of one credible witness who presents the Notary with acceptable identification and who is personally known by the Notary.

A Notary should decline the request to notarize a document, when a credible identifying witness is unavailable to identify a stranger without identification.

3. Can I notarize a photograph? No. It is improper to sign and stamp a photograph. The Notary's signature and seal are to be placed only on a notarial certificate (i.e., acknowledgment, etc.), which accompanies a written statement signed by another person. Nevertheless, a written statement that refers to an accompanying/attached photograph may be notarized. (Note: A Notary should be suspicious always about notarizing a photo-bearing card/document that could be used as a fake "official" ID.)

4. What if there is no room for my seal or if it smears? A loose certificate may be filled out and attached if notarial printing on a document leaves no room for a seal. When an initial seal impression cannot be read and there is enough space on the document, another impression may be affixed close to the first impression. The Notary should record in the journal that a second impression was affixed.

Do not try to fix an imperfect seal impression with correction fluid, ink or pen, as doing so might be seen as evidence of tampering, and the document may be rejected by the receiving agency.

5. Can I notarize signatures on faxes or photocopies of documents? Yes. If a signature bears an original signature, a photocopy may be notarized. (Do not notarize a photocopied signature.)

If a faxed document is on thermal paper, it should be photocopied to avoid future fading, to allow for signature and affixing of the Notary's seal. Of note, some public recorders might not accept notarized signatures on documents that are photocopied, as they do not adequately reproduce when microfilming.

6. May I notarize for customers only? No. A Notary should notarize for anyone who presents a lawful request. However, under California law, an employer and a Notary may agree that during business hours, the Notary's services may be limited to those transactions directly related to the employer's business. This means that there shall be no discrimination between customers and non-customers but between business-related and non-business-related documents.

7. Can I notarize a document in a language I cannot read? Yes. California Notaries are allowed to notarize documents in languages that they cannot read, if the document signature and notarial certificate are in a readable language.

It may be dangerous, however, in notarizing unreadable documents, because it may be difficult to make an accurate journal description or the document may be a fraud. If the Notary cannot communicate in the same language, the notarization should not be performed.

8. Can I certify a copy of a birth certificate? No. The only two documents a California Notary is authorized to certify are: (1) copies of Powers of Attorney, and (2) entries in their journals of notarial acts (if requested by the Secretary of State).

...Continues on page 14
The Seven Deadly Sins Of Trust Drafting

MARK W. BIDWELL

Persons owning real estate in California need a trust to avoid costly and lengthy legal action in probate court. A trust need not be expensive or complicated. An affordable, basic trust is a wise investment when these seven deadly sins are avoided.

THE FIRST SIN: PRIDE OR HUBRIS FOR RULING FROM THE GRAVE

Instead of outright distribution on death, people want to control the behavior of their loved ones by restricting access or use of assets. Ruling from the grave may be appropriate. The classic example is the drug addicted child. Any money given to the child will only go to drugs and most likely kill the child. Here detailed restrictions and safeguards are mandatory. But often ruling from the grave comes not from a place of caring, but from a sense of ego that creates hardship and bitterness.

For example one couple in their trust declared no child of theirs will receive any money until the child has graduated from the University of Southern California. No doubt these parents are devoted alumni. But a basic trust is no place for controlling children's lives. What happens if a child is not admitted to USC? The parent's hubris in their school will fall in a basic trust.

THE SECOND SIN: SLOTH FOR FAILURE TO CHANGE TITLE ON REAL ESTATE PROPERTY

The typical California resident who owns a home should have a trust for the home to avoid probate. To avoid probate the home must be titled into the trust. Not taking the effort to transfer the house into the trust is the most common mistake made and the most easy to correct. Now there is an online service www.DeedandRecord.com to prepare and record trust transfer deeds.

THE THIRD SIN: FEEDING THE LUST OF YOUTH BY DISTRIBUTING TO A MINOR

Persons under 18 years of age cannot receive assets. Any distributions directly to a minor will go through probate under court supervision. At least while the assets are under supervision of the court they are not wasted. But at age 18, the court must release the assets to the minor. The minor then spends the assets to feed his or her lust for life.

If there is a potential distribution to a minor, the trust should have a "children's trust" provision. A children's trust keeps the minor's assets under control of the trust until the child has reached an age of financial maturity, such as 25 years.

THE FOURTH SIN: ENVY CREATED BY ONE TRUST; TWO PRIOR MARRIAGES

Often persons in their second marriage together create one trust. The survivor is usually the wife. The husband never intended for distribution of assets to his children on his death. The trust provides for distribution of assets to all children upon the death of the second spouse.

In a pattern that is repeated again and again, an adult child envious of the assets of the deceased husband will demand from the widow a distribution of the father's assets. For some reason this is also done within a few days of death without giving the widow time to grieve.

The widow is now afraid, angry and hurt. The widow promptly goes to an attorney for protection. The typical trust can be changed by the surviving widow and in the process of change the terms of the trust are less favorable to children of the deceased husband.

Spouses with children from a prior marriage should avoid a joint trust. This means two trusts at twice the cost, but both surviving spouse and children will be protected. A basic
THE FIFTH SIN: WRATH INCURRED BY AN AMENDMENT INSTEAD OF A RESTATEMENT

Amendments must be read with the original. The heirs see what they would have received and what they now receive. Amendments typically do not include "no-contest" provisions. The situation causes wrath in the disinherited heir and is ripe for litigation or at the very least creates bitter resentment. Restatement replaces the entire prior document and does not waive red flags in the face of the disinherited heir.

THE SIXTH SIN: GLUTTONY AND THE RISK UNDUE INFLUENCE

People will put off their estate planning until their later years. In the later years objectivity is lost and dependency on others is created. Persons befriend the elderly in anticipation of a windfall at death. Heirs' and friends' gluttony for the elder's assets only increase as capacity of the elder decreases.

Any distributions out of the ordinary are questioned and become suspect, even if the distribution or bequest is valid. Trusts and Wills should be prepared when there is no question in the capacity of the testator. Changes then should only be made judiciously when there is a substantial change in circumstances.

THE SEVENTH SIN: GREED OF ATTORNEYS

Californians will use trust mills, boilerplate forms and pseudo legal centers because of apprehension or fear of walking into a law office and paying the full cost of an attorney. Often an estate planning attorney's best value is not in what is done, but advising on what to avoid. But too often attorneys charge the fees associated with advanced estate planning when all that is needed is a simple trust. #

LEGAL TERMINOLOGY Answers from page 36

LEGAL TERMINOLOGY ANSWERS

1. To be informed of; make certain regarding. (1 word) certiorari
2. According to value. (2 words) ad valorem
3. Proceeding against a thing or for a thing. (2 words) in rem
4. The process of bringing together two sides to agree to a voluntary compromise. (1 word) conciliation
5. Against. (1 word) contra
6. Body of the offense; essence of the crime. (2 words) corpus delicti
7. Of right; lawful. (2 words) de jure
8. A statement, remark, or observation in a judicial opinion which is not necessary for the decision of the case. (1 word) dictum
9. Bring with you. (2 words) duces tecum
10. And husband. (2 words) et vir
11. After the act is done; after the fact. (3 words) ex post facto
12. The material part of a grievance; core; nucleus; foundation. (1 word) gravamen
13. Among other things. (2 words) inter alia
14. Now for then. (3 words) nunc pro tunc
15. Equal fault. (2 words) pari delicto
16. A method of dividing an estate (by the stem). (2 words) per stirpes
17. As much as he/she deserved. (2 words) quantum meruit
18. A proceeding to recover unlawfully held personal property. (1 word) replevin
19. To speak the truth. (2 words) voir dire
20. Of his/her own will; voluntarily (2 words) sua sponte
Happy Days Are Here Again

BY MICHELLE TICE, CCLS, ELIZABETH ADAME, CCLS
2012 LSI ANNUAL CONFERENCE CO-CHAIRS

The Imperial County Legal Professionals Association (ICLPA) and the San Diego Legal Secretaries Association (SDSLA) are honored to host the 78th Annual Conference of Legal Secretaries, Inc., May 17-20, 2012, at the Bahia Resort Hotel in San Diego. This historic event will see a new Executive Committee installed, and we are excited to share our plans with all of you.

Our theme for this conference is “HAPPY DAYS.” The entire weekend will feature 50s-style décor and our committee will be easily recognized in their Pink Ladies jackets. With this theme comes a suggested dress code:

Our Friday Night Reception will be like hanging out at Arnold’s Diner, or at your school’s sock hop. Ladies should consider wearing a poodle skirt with white Keds, and perhaps rolled up jeans with saddle shoes. Gentlemen can think about whether they want to go with the Richie look – khakis, a button down shirt, and letterman sweater – or the Fonzi look – jeans, T-shirt, and black leather jacket.

Saturday’s banquet will be Prom Night at Rydell High. Full lacy dresses for the ladies, and guys in white dinner jackets are one option; channeling your inner John Travolta and Olivia Newton-John is another option. We have exciting entertainment planned that will accompany our theme before the awards ceremony and it promises to be a fun evening!

Sunday Brunch (and Installation) is going to be the smart 50s Business Woman/Man. Ladies can dress formally in a suit (with hat and gloves, of course), or go with the more simple skirt and blouse/sweater combination. Gentlemen should consider going with the Mad Men look in a suit and tie, or dress more simply in slacks with a pullover sweater, button down shirt, and tie.

Also, business meetings will require the business casual dress code (no jeans, sweats or flip flops).

Don Lee’s bay front hospitality suite will be open on Thursday, May 17 from 4:00 to 6:00 pm; Friday, May 18 from 4:00 to 6:00 pm; and Saturday, May 19 from 3:00 to 6:00 pm. Stop by for a refreshing drink while enjoying a view of Mission Bay.

We are also very pleased to once again offer limousine service on Sunday after installation, for those that need a ride to the airport. Be sure to sign up at the registration desk when you check in.

The Resort is located approximately 6.5 miles from the San Diego International Airport. Taxicabs are readily available and the Cloud 9 Shuttle is another transportation option and will cost up to $12 each way. There is always the option to rent a car as well. Parking at the resort is complimentary.

Our vendors will be located in the Mission A room, just inside the ballroom. They will be available to visit until the Welcome Reception, but this year, our vendors will have an opportunity to mingle with attendees during the Reception and take the opportunity to visit with the friends they have made over the years. The Welcome Reception will be held aboard the William D. Evans, a 19th century-style sternwheeler. Next to the William D. Evans is another boat, the Bahia Belle, and each attendee will be given a ticket to board the Bahia Belle (another sternwheeler) and cruise Mission Bay any evening during the Conference. The Bahia Belle features live music including swingin’ blues and DJs spinning great dance music for everyone to enjoy, with stops at both the Bahia and the Catamaran. Passengers can enjoy the Tangier Bar’s locally famous Piña Colada before boarding the Belle, and can disembark at the Catamaran to enjoy entertainment at Moray’s Lounge and then re-board for more fun on the bay.

The Bahia Resort Hotel is a San Diego Landmark. It was the first commercial lessee on Mission Bay. By 1953, the Bahia’s first 52 units were open and attracting visitors. Entrepreneurs William and Anne Evans took a risk and it paid off. Today, the Bahia Resort Hotel
is a 314-room destination hotel, which includes beachfront cottages, studios with panoramic views, and spacious bay-side suites. The room rates for our conference include a very attractive $139 single/double standard room rate with the option to upgrade to a suite for an additional $100 per night. For those looking to share a room with others, the rate is $159 for triple occupancy and $179 for quad occupancy.

The standard amenities in each room will include complimentary high-speed wireless Internet, HBO, AM/FM radio, coffeemaker, ironing board and iron, hairdryer, refrigerator and signature bath supplies. The suites are equipped with a kitchenette, including a refrigerator, stove, microwave, and cooking utensils, dining area for four, and one king bed or two double beds.

The Bahia’s water sports rental center has everything you need to experience the beautiful Pacific Ocean and Mission Bay Aquatic Park and boardwalks. They offer equipment for biking, pedaling boats, surfing, kayaking, sailing, power boating, and more. Complimentary beach cabanas are available along its secluded beach for relaxing and soaking up the sun.

For those looking to occupy some free time, Mission Bay is one of San Diego’s most popular outdoor destinations, a complex of waterfront parks, public beaches and grassy, palm-lined recreation paths strung along 27 miles of shoreline. At Mission Bay San Diego you can fly a kite, go bird watching, or have a picnic, but water sports rule here. Eastern Mission Bay is popular with jet boats, jet skis and the like, while the seaward side attracts sailboats and sailboarders.

Besides the things you can do in Mission Bay San Diego parks, these are a few other area activities:

Visit Belmont Park: An old-fashioned beachfront amusement park that’s home to the 1925 Giant Dipper roller coaster.

Visit Sea World: Killer whale Shamu is the star here, but you’ll find plenty of other things to do.

Visit the world famous San Diego Zoo: The world’s greatest zoo is a must-see, over and over. This 100-acre, lushly landscaped facility is what all zoos in the world measure up to. Bio-climatic exhibits such as Tiger River, Polar Bear Plunge, and the newest exhibit, Monkey Trails, simulate habitats that allow native animals to roam and intermingle. And of course, one mustn’t miss the Giant Panda Research Station, home to Bai Yun, Gao Gao, and Mei Sheng.

Visit Old Town San Diego: There are a great many places to shop and dine with unique products and a quaint atmosphere. Bazaar del Mundo, Fiesta de Reyes, the Old Town Market, and many boutique shops offer a variety of uncommon gifts.

Beach bonfires are a particularly “California” activity, and you’ll find containers for beach fires at many Mission Bay San Diego beaches. You can have a fire from 5:00 a.m. to midnight. Bring your own wood and/or charcoal, which you can buy at many San Diego area grocery stores.

Located along Pacific Beach’s main streets, Grand and Garnet Avenues, shoppers love the thrift stores, vintage clothing stores, boutiques, coffeehouses, and hookah bars that line the two streets.

With its dramatic coastline and spectacular views, it’s no surprise that La Jolla was one of the first San Diego neighborhoods to be settled, and has since become some of the most prized real estate in the nation. Start with a scenic drive or stroll along Coast Boulevard. At the north end just off Prospect Street, you’ll find a dirt path leading to the top of Deadman’s Bluff, or you can descend a tunnel in the basement of the old Curio Shop to visit Sunny Jim’s Cave. Here you’ll find a variety of native sea birds nesting on the cliffs and sea lions sunning on the rocks below. Next is La Jolla Cove, a protected marine sanctuary with an idyllic crescent of beach sheltered from all but the worst of winter storms. The Cove is the best place in town for a safe swim or snorkeling.

When you’re finished with your tour of the coast, head one block inland and you’ll find yourself back on Prospect Street. Returning north again, you’ll pass the Museum of Contemporary Art San Diego, a popular public playground for children, and several of San Diego’s most beautiful churches. Soon you’ll arrive at the main business district, continuing for several blocks along Prospect and down the side streets of Fay, Girard, and Herschel. Here you’ll find the romantic old-world hotels, gourmet restaurants, and upscale shops for which La Jolla is famous.

With so many wonderful activities to choose from, the Bahia is offering LSI members the contracted room rate for three days prior to conference and three days after conference. Bring your families, make a mini-vacation of your time here, and arrive in America’s Finest City with extra time to spare. We look forward to welcoming all of you to San Diego!
Social Networking Research & Investigations - The Legal, Ethical & Evidentiary Issues

BY RICHARD B. HARER — SUBMITTED BY RIO HONDO DISTRICT LPA

RICHARD HARER

Richard Harer is Vice President of Specialized Investigations, a statewide company in California, Arizona, and Washington with over 60 employees. His areas of expertise include Medical Fraud, Insurance Fraud, Surveillance, Asset Searches, Skip Tracing and General Backgrounds. Richard is also an Expert in Social Media Investigations, Computer Databases and Public Records. He has a Bachelor of Science in Criminal Justice with minors in Political Science and Sociology from the University of South Dakota. Website address: www.attyinfo.com.

SOCIAL MEDIA: A REQUIRED TOOL
Social networking sites have become such "standard tools" that Peter Foley, Vice President of claims at American Insurance Association said that investigators and (legal researchers) could be considered negligent if they didn't conduct at least "a quick scan of social media to check for contradictions."

However, Foley and other insurance experts caution that the information should be used only as launch pad for further investigations and never as final proof of fraud. Manulife, citing ongoing legal proceedings, declined to comment on a recent case involving information developed on a social media site that contradicted an insured's disability claim, but said in a statement, "We would not deny or terminate a valid claim solely based on information published on websites such as Facebook."

EXAMPLES OF INVESTIGATIVE USE
Surveillance cases can benefit immensely by obtaining photos, habits, activities, and other pertinent information on the subject before initiating surveillance. Locating witnesses, insured, claimants, and others is another excellent use of social media sites. Background information, character, habits, activities, financial information, and other useful information can also be obtained. Identifying relationships/accomplices is also an excellent source of information on social media sites.

There are many other benefits of social media research and investigation, which is only limited by the researchers' imagination... and time.

The following is a list of the ten most popular social media sites in the US (as of August 2011): Facebook, Twitter, LinkedIn, MySpace, Ning, Google Plus+, Tagged, Orkut, hi5, and myYearbook.

SOCIAL NETWORKING RESEARCH TOOLS
Searching hundreds of social sites for information would be time prohibitive. However, there are numerous "fee for service" and free sites available that act as "search engines" and can do some of the work for you, by searching dozens of social sites at once. A few of these sites are: www.Skipsmasher.com, cleartomersonreuters.com, pipl.com, yoname.com, and wink.com.

There are many other paid sites and free sites to select from and a website where you can find various sites to search multiple social media sites at once: http://www.makeuseof.com/tag/how-to-search-multiple-social-media-sites-at-a-time.

TWITTER
Twitter is another rapidly growing social media site, with over 100 million users (as of September 2011). Twitter can be another valuable resource but has some limitations. There are Twitter search engines that will enable you to conduct searches by any name and/or topic. The Twitter search engines are monitter.com and twellow.com.

BLOGS
Blogs have become less popular as a social networking medium, especially among younger viewers, who are too busy (or distracted) to write lengthier posts. According to a recent New York Times article, "People are turning to other social networks to share and find opinions online." Twitter, Facebook, and blogging hybrids - such as Tumblr and Posterous - have
made it even easier for Internet users to share their opinions. However, there are still an estimated 122 million blog readers in the US (as of May 2011).

MESSAGE BOARDS & FORUMS
There are thousands of message boards and forums on the internet, and one of the best sources of information available on an individual or group. There are several sources to search for individuals or groups at boardtracker.com and search.bigboards.com.

CRAIGSLIST
Craigslist is described as “a centralized network of online communities featuring free online classified advertisements, with sections devoted to jobs, housing, personals, for sale, services, community, gigs, résumés, and discussion forums. The ads are posted in the respective cities in the area where the posting party is generally located. However, it can be tedious to search across many different cities when conducting research on a particular individual and/or topic.

SOCIAL MEDIA RESEARCH: ETHICAL ISSUES
There are a number of ethical issues that have been raised surrounding access to information on social media sites and individual privacy. In short, any information that is accessible to the public is “fair game,” and is not protected by any 4th amendment right to privacy. In other words, if it can be located, read, and printed out from the internet, it can be used for any legal (or personal) matter needed.

However, things get a little “murkier” when researchers or investigators create fictitious profiles in order to “friend” or “connect” with someone to gain access behind their “walls” (created by privacy settings) to their “inner circle” of “friends,” and (social media) conversations and it is important to be aware of other potential legal liability of the actions of others working on behalf of the attorney in the course of the investigation. For example, in California, lawyers retaining an investigator may be liable for the investigator’s improper actions (Noble v. Sears, Roebuck & Co. 33 Cal. App. 427 654 (1973)).

SOCIAL MEDIA RESEARCH: EVIDENTIARY ISSUES
You just developed some very compelling evidence from a social media site that essentially “makes your case.” Now that the information has been printed out and saved, what are the evidentiary issues that you may encounter? Will the Judge accept the information as evidence in a court proceeding? Will the opposing side object to the admission of the evidence on the grounds that it was protected by their client’s 4th amendment right to privacy?

According to current case law in a number of states, the prevailing position taken by the courts is, “A user might enable privacy settings on a social media account, but that does not automatically protect that information from discovery in a legal proceeding. A court resolves an objection to a discovery request by balancing the burden and possible oppression of producing the information — including the potential invasion of privacy — with the material need for such information.” For example, in Roman v. Steelcase, Inc., the court found that a party had no reasonable expectation of privacy to their SNS postings. While Roman was outside the scope of the Fourth Amendment, the lack of an expectation of privacy reflects the growing trend to view SNS information as non-privy. The Court ordered the plaintiff to give her consent to the defendant to obtain the SNS information.

So if the social media postings are not “protected,” can the social media site postings be simply subpoenaed? Not exactly! Even though subpoenaing Facebook or MySpace may seem an obvious choice, it’s not likely to render results, as shown in Crispin v. Christian Audigier (2010).

How can the information be obtained legally? The growing trend appears to be the use of a court order. However, courts may be reluctant to compel service providers to provide broad, unrestricted access to social networking user information, but may order production in response to narrowly tailored requests.

In addition, there are other methods of formal discovery to develop further information about the social media usage of the subject. For example, interrogatories should seek to identify an opponent’s screen names and relevant social media usage. Requests for production should seek blog entries and social media posts, and requests for admission should be designed to authenticate such information. In addition, the subject should be questioned extensively about social media usage during depositions and court testimony.

What about the “publicly obtained” compelling information that you developed and printed out from the social media site, and are ready to submit as evidence? Fortunately, the laws to date would appear to have a very low threshold in admitting this evidence. The evidence can be satisfied by the testimony of a witness who has personal knowledge that the evidence is what it purports to be. In fact, courts have held that website printouts need not be authenticated by the site’s owner but can be authenticated, for example, by an attorney who testifies that she visited a particular site, recognized it as the opposing party’s, and printed what she saw on the screen. (Jarritos, Inc. v. Los Jarritos (2007)).

OTHER EVIDENTIARY CONCERNS
One must be very cautious when considering the validity of information obtained from social media sites. It is extremely common for individuals to

...Continues on page 14
Welcome to the May 2012 issue of The Legal Secretary. In this issue we have many articles of interest including “Now That You’re a Notary, What’s Next?” by Hannalore Dietrich, CCLS, “What’s Your APPtitude?” by Dimetria Jackson, Esq. and “Five Easy Things You Can Do To Protect Your Family” by Robert Mansour, Esq.

It is important to share your achievements and ideas with all members. You can accomplish this by submitting articles for publication in upcoming issues. In today’s busy society, it can be hard to think about finding time to write or submit articles. However, the benefits are enormous, both to you, your family, and your Associations. The right article can help you find friends, reach out to LSI, and even advance your career.

You can also help by volunteering to be an Officer or Chairman in LSI or on your local Association board. Did you know the many benefits of helping out? Here are a few:

- **Volunteering increases self-confidence.** Volunteering can provide a healthy boost to your self-confidence, self-esteem, and life satisfaction. You are doing good for others and the Association, which provides a natural sense of accomplishment. Your role as a volunteer can also give you a sense of pride and identity. And the better you feel about yourself, the more likely you are to have a positive view of your life and future goals.

- **Volunteering combats depression.** Reducing the risk of depression is another important benefit of volunteering. A key risk factor for depression is social isolation. Volunteering keeps you in regular contact with others and helps you develop a solid support system, which in turn protects you against stress and depression when you’re going through challenging times.

- **Volunteering can advance your career.** If you’re considering a new job, volunteering can help you get experience in your area of interest and meet people in the field. It gives you the opportunity to practice important skills used in the workplace, such as teamwork, communication, problem solving, project planning, task management, and organization. You might feel more comfortable stretching your wings at work once you’ve honed these skills in a volunteer position.

There are numerous opportunities available. The key is to find the position that you would enjoy and are capable of doing. Talk with other members and LSI Officers and Chairmen for more information. Step outside the box, you will be glad you did.

Speaking of stepping outside the box, would you prefer to receive The Legal Secretary magazine via electronic mail? This would offer many advantages over the publication as a printed magazine. The most important advantage is the difference between "print time" and "electronic time." Typically, articles are received, sent out for approval, then forwarded to magazine proofreaders. The editor receives all suggested changes and creates documents in the proper form and content to be forwarded to the designer. This takes much time and effort which could be reduced if the magazine was sent electronically. As announced during the February Board of Governors meeting, LSI is looking for ways to cut costs. Electronic publication would save a considerable amount of money. As Governors, you are the members to suggest changes.

Your voice and support in taking The Legal Secretary magazine to the next level will be an invaluable way of helping others and in helping to increase our knowledge in all areas of law. The Editor welcomes your comments and would be happy to hear how upcoming issues of The Legal Secretary can be improved.
GUIDELINES FOR SUBMISSION OF ARTICLES TO THE LEGAL SECRETARY

DEADLINES FOR RECEIPT OF ARTICLES BY EDITOR
1. August issue (First Quarter) June 1st
2. November issue (Second Quarter) September 1st
3. February issue (Third Quarter) December 1st
4. May issue (Annual/Fourth Quarter) March 1st

SUGGESTED TOPICS FOR ARTICLES
1. Legal procedures
2. Law office management procedures
3. Word processing/computer hints/technology/internet/world wide web
4. Office equipment/environment
5. Personal safety
6. Career promotion
7. Keynote cases
8. CCLSs are encouraged to submit articles about their experience as a CCLS and/or pursuit for certification – e.g., CCLS mock exam (with answers)
9. Information about our publications: LSI Legal Professional's Handbook; Law Office Procedures Manual; The Legal Secretary magazine
10. Any Specialization area (Civil Litigation; Criminal Law; Family Law; Law Office Management; Probate/Estate Planning; Transactional Law) and appellate articles as well
11. Photographs and/or articles regarding the success of association(s) event(s) (how, when and why successful)
12. Other topics of general interest to the legal community

SUBMISSION GUIDELINES
1. Articles must be submitted by email as an attached document using word processing programs such as Microsoft Word or WordPerfect and saved as "doc", "txt", "wpd" or "ASCII" file. When sending email, include in subject line: "[Last Name of Author] and [contents], “ i.e., Smith - Article, Bio and Photo.
2. All articles submitted must be at least 500 words and no more than 2500 words.
3. Articles sent in PDF format are not acceptable.
4. All articles submitted must be accompanied by the name, email address, contact information of person submitting the article, and name of submitting Association. Articles that do not have this information cannot be considered for publication.
5. Type all copy in Times New Roman 12 point type to fit across an 8-1/2" x 11" page, single spaced. Avoid using style attributes such as bold, italic, centering, columns or tabs.
6. Articles are subject to approval and/or editing. Editor cannot guarantee publication in any given issue, although every effort will be made to publish as soon as possible after acceptance.
7. Articles submitted and published in The Legal Secretary become the property of LSI unless prior agreement is obtained by the authors

PHOTOGRAPHS
1. Digital photography is required and must be a resolution high enough to guarantee at least 300 dpi at 100% scale. When sending email with photo attached, include in subject line: “[Name of Officer/Chairman] Photo,” i.e., Jane Smith - Photo.

Deborah Rickert, CCLS • Editor, The Legal Secretary
LATHAM & WATKINS LLP
650 Town Center Drive, Suite 2000, Costa Mesa, CA 92626-1925 • 714.755.8132 • email: deborah.rickert@lw.com
<table>
<thead>
<tr>
<th>LEGAL TERMINOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>W S I B R O P A R I D E L I C T O U C A N S A M H G</td>
</tr>
<tr>
<td>G Z M A F W N E P C A R P E D I E M F O W W X D O</td>
</tr>
<tr>
<td>K C G S N F E T N O P S A U S W L W H T C I D E X C</td>
</tr>
<tr>
<td>I O O I P I B E P W I L E X I L E W E R M M J X K H</td>
</tr>
<tr>
<td>X N C W C X M E S E E B I L L W L I O U W P L A</td>
</tr>
<tr>
<td>W L T L I W Y O W B M R P N K T T E P R A T T W E</td>
</tr>
<tr>
<td>P I O H L C M F I J O N P M Q T E V O S F I R S</td>
</tr>
<tr>
<td>M A D O R P U D E L L I E C T I N W U H I E W T O A O S</td>
</tr>
<tr>
<td>T I R S O T I B N A I E O N W A I R E I N C D B</td>
</tr>
<tr>
<td>I S Q M L E W D T W D M R P N S R S I T L C</td>
</tr>
<tr>
<td>T O N E L Y P A D V A L O D E Z U S Z A M G U N M</td>
</tr>
<tr>
<td>G U N E D T L Y P A D V A L O D E Z U S Z A M G U N M</td>
</tr>
<tr>
<td>P Y L V P U M T E P A T E U I T E M H U T S A T R N U</td>
</tr>
<tr>
<td>Q M A M E S E N W N U R M L E F E I E O A S N N N G I N</td>
</tr>
<tr>
<td>B V N K R S E O X E O E N E R O R H C I A E H D I C</td>
</tr>
<tr>
<td>U P H R E T I E E X V M G I B N F T H O I H T E</td>
</tr>
<tr>
<td>D E A M W R I T W U A S A N E W H I N E T I I P M N E O M</td>
</tr>
<tr>
<td>R C S P M V O I R D I R E Q U I Z R U L V F T X O M</td>
</tr>
<tr>
<td>M W Q P E J B Y V G A D I N S T R N B W O R P R</td>
</tr>
<tr>
<td>S O O D S K Q U E T S U B P O E N N A C A C T U E S</td>
</tr>
<tr>
<td>O W W X W R B L E G A L O W C C O M P U T A T W D C</td>
</tr>
<tr>
<td>L O K D N B A I L N E T I N L O W H Y M E P Y W</td>
</tr>
</tbody>
</table>

1. To be informed of; make certain regarding. (1 word) ___
2. According to value. (2 words) ___
3. Proceeding against a thing or for a thing. (2 words) ___
4. The process of bringing together two sides to agree to a voluntary compromise. (1 word) ___
5. Against. (1 word) ___
6. Body of the offense; essence of the crime. (2 words) ___
7. Of right; lawful. (2 words) ___
8. A statement, remark, or observation in a judicial opinion which is not necessary for the decision of the case. (1 word) ___
9. Bring with you. (2 words) ___
10. Ard husband. (2 words) ___
11. After the act is done; after the fact. (3 words) ___
12. The material part of a grievance; core; nucleus; foundation. (1 word) ___
13. Among other things. (2 words) ___
14. Now for then. (3 words) ___
15. Equal fault. (2 words) ___
16. A method of dividing an estate (by the stem). (2 words) ___
17. As much as he/she deserved. (2 words) ___
18. A proceeding to recover unlawfully held personal property. (1 word) ___
19. To speak the truth. (2 words) ___
20. Of his/her own will; voluntarily (2 words) ___

*Answers on page 29*
# Dates to Remember in 2012

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 11, 2012</td>
<td>Deadline to sign up for Legal Specialization Section Workshops</td>
</tr>
</tbody>
</table>
| May 17-20, 2012    | 78th Annual Conference Hosted by Imperial County LPA and San Diego LSA  
                       Bahia Resort San Diego |
| June 1, 2012       | Deadline for submission of articles for August issue of *The Legal Secretary* |
| July 27, 2012      | Last day to postmark August conference registration to receive discount |
| August 17-19, 2012 | LSI First Quarterly Conference  
                       Hosted by Alameda County and Livermore-Amador Valley |
| August 21, 2012    | Last day to submit CCLS Exam Application to the CCLS Certifying Board |
| September 1, 2012  | Deadline for submission of articles for November issue of *The Legal Secretary* |
| September 20, 2012 | Last day to submit CCLS Exam Application to the CCLS Certifying Board with payment of late fee |

# Helpful Websites

- **Supreme Court of the United States**  
  [http://www.supremecourt.us](http://www.supremecourt.us)

- **Office of the Attorney General**  
  [www.ag.ca.gov](http://www.ag.ca.gov)

- **California Courts**  
  [http://www.courtnfo.ca.gov](http://www.courtnfo.ca.gov)

- **California Assn. of Legal Support Professionals**  
  [www.caispro.org](http://www.caispro.org)

- **California Codes**  
  [http://www.leginfo.ca.gov/calaw.html](http://www.leginfo.ca.gov/calaw.html)

- **California State Bar**  

- **California Legislative Information**  
  [http://www.leginfo.ca.gov](http://www.leginfo.ca.gov)

- **U.S. Citizen and Immigration Services**  
  [http://www.uscis.gov](http://www.uscis.gov)

- **Administrative Office of the U.S. Courts**  
  [http://pacer.psc.uscourts.gov](http://pacer.psc.uscourts.gov)

- **American Medical Association**  

- **American Association of Law Libraries**  
  [http://www.aallnet.org](http://www.aallnet.org)

- **National Notary Association**  
  [http://www.nationalnotary.org/index.cfm](http://www.nationalnotary.org/index.cfm)

- **California Secretary of State**  
  [www.sos.ca.gov](http://www.sos.ca.gov)

- **National Court Reporters Association**  
  [http://www.ncraonline.org](http://www.ncraonline.org)
LEGAL SECRETARIES, INCORPORATED
LEGAL PROFESSIONAL’S HANDBOOK
FOR CALIFORNIA LAW PRACTICE
compiled by Legal Secretaries, Incorporated
published by The Rutter Group

LEGAL STAFF’S ULTIMATE RESOURCE GUIDE FOR OVER 75 YEARS!

STEP-BY-STEP GUIDANCE: Step-by-step instructions for each major area of law practice; shows deadlines, fees, number of copies, addresses and all the other details needed to do the job right the first time!

FORMS: Judicial Council forms are included, plus practice-tested forms for pleadings, motions, business documents, transmittal letters, etc.

RELIABLE: The Handbook is written and reviewed by experienced legal secretaries, attorneys and judges. The Publications Revision Committee has years of practical know-how and expertise in each area covered in the Handbook.

UP-TO-DATE: The Handbook covers the current statutes and court rules. It is kept up-to-date by the Publications Revision Committee through annual replacement pages.

CONTENTS
- California Court System
- Statutes of Limitation/Jurisdiction
- Attachment/Other Provisional Remedies
- Commencement of Civil Actions
- Discovery in Civil Actions
- Preliminary Judgment in Civil Actions
- Postjudgment Proceedings
- Civil Appeals and Writs
- ADR
- Foreclosures: Mortgages and Trust Deeds; Mechanic’s Lien
- Unlawful Detainer
- Federal Civil Procedure and Appeals
- Bankruptcy
- Family Law
- Adoptions
- Criminal Law and Procedure
- Probate Proceedings: Decedents’ Estates; Guardianships/Conservatorships; Trust Law
- Workers’ Compensation
- California Commercial Code
- Corporations
- Limited Partnerships
- Intellectual Property Law: Copyrights; Trademarks; Patents
- Miscellaneous General Information

LEGAL PROFESSIONAL’S HANDBOOK ORDER FORM

<table>
<thead>
<tr>
<th>TITLE</th>
<th>PRICE</th>
<th>QTY</th>
<th>SUBTOTAL</th>
<th>TAX</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Professional’s Handbook</td>
<td>$236 (LSI Members-Only Price)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Professional’s Handbook</td>
<td>$295 (Nonmembers Price)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ MY PAYMENT IS ENCLOSED. 45-day return privileges apply.
☐ PLEASE SEND ON 45-DAY APPROVAL. If I decide not to keep this title, I will return it within 45 days at my own expense.
Your subscription(s) to future Updates will be entered automatically. If you do not wish to receive automatic Updates, check box below. ☐ Do not send future Updates. I understand this product has limited value without Updates. (Cost of 2011 Update was $135.)

NAME ______________________________ PHONE (_____)
E-MAIL ADDRESS __________________________ STATE BAR NUMBER ____________
FIRM ______________________________________________________________________
ADDRESS ____________________________________________________________________ SUITE __________
CITY __________________________ STATE __________ ZIP ____________

☐ Enclosed is my check for $ __________ payable to THE RUTTER GROUP
☐ Charge $ __________ on my ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS
CREDIT CARD NUMBER _________________________ EXP. DATE ____________
SIGNATURE _________________________________

To order or for more information, call 1-800-747-3161 (ext. 2)
<table>
<thead>
<tr>
<th>ITEM</th>
<th>UNIT PRICE</th>
<th>QUANTITY</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BRASS TACKS</strong>* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 1/2010) No charge for PDF [ ] Send hard copy [ ]**</td>
<td>$ 5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CAREER PROMOTION/SCHOLARSHIP NOT JUST A SECRETARY BOOKLET</strong> Currently under revision and not available at this time</td>
<td>N/C</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CCLS BROCHURE</strong> Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)**</td>
<td>25.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CCLS MOCK EXAM (Revised 2010)</strong> Sample questions and answers to assist in preparing for all sections of the CCLS Exam.</td>
<td>35.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CCLS PIN</strong> A ½” high, 10-kanit gold-filled pin with CCLS logo. For the CCLS.</td>
<td>199.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CCLS STUDY KIT</strong> Contains Mock Exam (see above), Gregg Reference Manual with Instructor’s Resource Guide, Basic and Comprehensive Worksheets.</td>
<td>N/C</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>GUIDELINES FOR HOSTING LSI CONFERENCES</strong> An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 12/09)</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</strong> A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)**</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES</strong> A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 11/08)</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HISTORY OF LEGAL SECRETARIES, INCORPORATED</strong> A 50-page memory of people, places and events since 1929. (Rev. 3/2010)**</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LAW OFFICE PROCEDURES MANUAL FLYER</strong> An 8 ¼” x 11” advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/2010)**</td>
<td>N/C</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LAW OFFICE PROCEDURES MANUAL INSTRUCTOR’S GUIDES</strong> To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.</td>
<td>4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEACHER TRAINING CHAPTER (Rev. 9/07)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADOPTIONS CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CIVIL PROCEDURE CHAPTER (Rev. 9/07)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONSERVATORSHIP CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORPORATIONS CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COURT STRUCTURE CHAPTER (Rev. 9/07)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRIMINAL LAW CHAPTER (Rev. 9/07)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DISCOVERY CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FAMILY LAW CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROBATE CHAPTER (Rev. 9/07)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>REAL ESTATE CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNLAWFUL DETAINER CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WORKERS’ COMPENSATION CHAPTER (Rev. 9/07)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MISCELLANEOUS CHAPTER (Rev. 6/11)</td>
<td>7.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LEGAL SECRETARY'S REFERENCE GUIDE</strong> A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 11/09)**</td>
<td>30.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LSI BYLAWS AND STANDING RULES</strong>* As currently adopted by the LSI Governors.</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL THIS PAGE</strong></td>
<td>$</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Item available to LSI members only.

(Prices effective 07/01/2011)
<table>
<thead>
<tr>
<th>ITEM</th>
<th>UNIT PRICE</th>
<th>QUANTITY</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER</td>
<td>An 8 ½&quot; x 11&quot; advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/2010)</td>
<td>$</td>
<td>N/C</td>
</tr>
<tr>
<td>LSI LEGAL SPECIALIZATION SECTIONS BROCHURE</td>
<td>Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)</td>
<td>N/C</td>
<td></td>
</tr>
<tr>
<td>LSI MEMBERSHIP BROCHURE</td>
<td>Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)</td>
<td>N/C</td>
<td></td>
</tr>
<tr>
<td>LSI MEMBERSHIP PIN* (Magnetic)</td>
<td>A ¾&quot; high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and “Legal Secretaries, Incorporated” inscribed on circumference. For all LSI members.</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>LSI ROSTER*</td>
<td>Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.</td>
<td>N/C</td>
<td></td>
</tr>
<tr>
<td>MEMBERSHIP APPLICATION FORM*</td>
<td>An 8 ½&quot; x 11&quot; form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information. (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.</td>
<td>N/C</td>
<td>□ E-mail □ Printed</td>
</tr>
<tr>
<td>NEW MEMBER PACKET*</td>
<td>A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional’s and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.</td>
<td>N/C</td>
<td></td>
</tr>
<tr>
<td>PRESIDENT’S PENDANT*</td>
<td>A 1&quot; high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and “Legal Secretaries Association” inscribed on circumference. Eye for necklace chain on back. For local association presidents.</td>
<td>7.00</td>
<td></td>
</tr>
<tr>
<td>PRESIDENT’S PIN*</td>
<td>Same as pendant (see above). Specify magnetic or pin back.</td>
<td>7.00</td>
<td></td>
</tr>
<tr>
<td>TOTAL THIS PAGE</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL PREVIOUS PAGE</td>
<td>+</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>TOTAL ORDER</td>
<td>=</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>MAILING/SHIPPING AND HANDLING (15% OF TOTAL ORDER)</td>
<td>+</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>SUB-TOTAL, INCLUDING MAILING/SHIPPING AND HANDLING</td>
<td>=</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>CALIFORNIA SALES TAX (7.25% OF SUB-TOTAL ABOVE)</td>
<td>+</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>TOTAL DUE</td>
<td>=</td>
<td>$</td>
<td></td>
</tr>
</tbody>
</table>

PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL IMMEDIATE REQUIREMENTS. COMPLETE PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO LEGAL SECRETARIES, INCORPORATED, CORPORATE OFFICE, PO BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (707) 682-6888. CHECK OR CREDIT CARD INFORMATION MUST BE INCLUDED. ORDER WILL BE MAILED OR SHIPPED WITHIN 10 DAYS OF RECEIPT, SUBJECT TO AVAILABILITY.

DELIVER TO: NAME ____________________________ ASSOCIATION ____________________________

ADDRESS ____________________________ CITY __________ STATE ______ ZIP ______

DAY TELEPHONE (_____) __________ E-MAIL __________________________

Method of Payment: Check, payable to “LSI,” enclosed □ VISA □ MASTERCARD □

Credit Card Information: Number __________ Expiration Date: Month _____ Year _____

Name on Credit Card: ____________________________ Card Verification Number __________

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS $25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

*Item available to LSI members only. (Prices effective 07/01/2011)
California Certified Legal Secretary
A Program of
Legal Secretaries, Incorporated

APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

CCLS Certifying Board
24740 Oro Valley Road
Auburn, CA 95602

☐ Northern California  ☐ Saturday, October 20, 2012
☐ Southern California  ☐ Saturday, March 16, 2013

Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a $30 late fee, in addition to the fees listed below, if space is available.

<table>
<thead>
<tr>
<th>EXAMINATION FEES*</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSI MEMBERS**</td>
</tr>
<tr>
<td>Registration fee:</td>
</tr>
<tr>
<td>$ 25.00</td>
</tr>
<tr>
<td>Examination fee:</td>
</tr>
<tr>
<td>$ 100.00</td>
</tr>
<tr>
<td>Total:</td>
</tr>
<tr>
<td>$125.00</td>
</tr>
<tr>
<td>Non-LSI MEMBERS</td>
</tr>
<tr>
<td>Registration fee:</td>
</tr>
<tr>
<td>$ 75.00</td>
</tr>
<tr>
<td>Examination fee:</td>
</tr>
<tr>
<td>$ 100.00</td>
</tr>
<tr>
<td>Total:</td>
</tr>
<tr>
<td>$175.00</td>
</tr>
</tbody>
</table>

Enclosed is a check in the sum of $_______________________***, payable to LSI.

* Fees subject to change without notice.
** LSI members: Name of local association: ____________________________ LSA/LPA.
Please enclose a photocopy of your local membership card.
You must be a member upon application to be eligible for reduced fees.
*** Include $30 late fee if applicable.

Name ___________________________ Last 4 Digits of SSN ___________

Mailing Address: ____________________________

City/State/Zip: ____________________________

Day Phone: ____________________________ Evening Phone: ____________________________

E-mail(s): ____________________________

Rev. April 2012 Please Complete Reverse Side This form may be reproduced.
Highest level of formal education completed: _______; Highest Degree: ______.

EMPLOYMENT RECORD: Please list legal secretarial employment, beginning with your most recent (or current) employment, to show a minimum of two full years of such employment. Attach a supplemental page if additional entries are necessary to show two full years of employment as a legal secretary.

Dates __________________________ Position __________________________
Employer __________________________
Address __________________________
City/State/Zip __________________________
Supervisor __________________________ Phone __________________________
Summary of Duties __________________________

Dates __________________________ Position __________________________
Employer __________________________
Address __________________________
City/State/Zip __________________________
Supervisor __________________________ Phone __________________________
Summary of Duties __________________________

__________________________________
I certify that I have completed this application truthfully. I understand that a false statement may result in the rejection of this application or revocation of my certification. I understand and agree that the contents of the examination are confidential and are not to be discussed. I understand that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Signature of __________________________ Date ____________
Applicant
<table>
<thead>
<tr>
<th>DISCOUNT THROUGH CEB</th>
<th>WORKING ADVANTAGE</th>
</tr>
</thead>
</table>
| Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit http://ceb.com/LSI/ | Toll Free: (800) 565-3712  
www.workingadvantage.com  
Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more.  
Member ID: Contact LSI Corporate Office, lscorp@aol.com, or LSI Vice President |

<table>
<thead>
<tr>
<th>HERTZ CORPORATION</th>
</tr>
</thead>
</table>
| Effective Date: June 1, 1996  
CDP Card #476998  
(800) 654-3131  
www.hertz.com |

<table>
<thead>
<tr>
<th>INSURANCE AND FINANCIAL PROVIDERS</th>
</tr>
</thead>
</table>
| AFLAC AND WORKERS’ COMPENSATION QUOTES  
Steven C. Dannenberg [Independent Broker]  
11091 Rhyolite Drive, Suite 4  
Redding, CA 96003  
Direct: (530) 339-8869 - Office: (530) 243-9879  
Fax: (530) 243-8890  
E-mail: dannenberginsurance@gmail.com  
Offering supplemental insurance for Accident, Sickness, Cancer, Dental, Hospital Indemnity and Heart Attack/Stroke. |
| CAPITAL INVESTMENT ADVISERS  
Emerson J. Fersch, CFP, ChFC, CLU, CASL  
5000 E. Spring Street, Suite 200  
Long Beach, CA 90815  
Office: (562) 420-9809 or (877) 270-9342  
Fax: (562) 420-9855  
www.rjferch.com  
| DWORIN INSURANCE SERVICES  
Earl Dwarkin  
467 Hamilton Avenue, Suite 1  
Palo Alto, CA 94301  
Office: (650) 329-1330 or (600) 332-4313  
Fax: (650) 329-9957  
www.dworininsurance.com  
Offering Individual and Family Medical Insurance, Travel Medical, Medicare Supplements, Dental Plans, and Part D Prescription Drug Plans |
| LEGACY WEALTH MANAGEMENT  
Daniel R. Henderson, MBA, CFP  
3478 Buskirk Avenue, Suite 300  
Pleasant Hill, CA 94523  
Office: (925) 236-2853 or (877) 679-9784  
Fax: (925) 944-5675  
E-mail: daniel@legacywealthmanagement.biz  
www.legacywealthmanagement.biz  
Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K. |
| DAVID WHITE & ASSOCIATES  
Wealth Accumulation and Preservation  
3150 Crow Canyon Place, Suite 2000  
San Ramon, CA 94583  
(800) 548-2671  
Contact: Ryan Gonzales (ext. 2682), rgonzales@dwhiteassociates.com, or Matt Kay (ext. 2626), mkay@dwhiteassociates.com  
Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance. |

<table>
<thead>
<tr>
<th>CREDIT UNIONS</th>
</tr>
</thead>
</table>
| LA FINANCIAL FEDERAL CREDIT UNION  
P.O. Box 6015  
Pasadena, CA 91102-6015  
(800) 694-1200  
www.laffinancial.org  
Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member. |
| PROVIDENT CREDIT UNION  
303 Twin Dolphin Drive  
P.O. Box 8007  
Redwood City, CA 94063-0807  
(800) 632-4699 - (650) 508-0300  
www.providentcu.org  
All LSI members are eligible to join. |

| QUESTIONS AND CONCERNS CONTACT:  
Sandra T. Jimenez, CCLS, LSI Vice President  
LSI® Marketing Committee Coordinator  
P.O. Box 58, Seeley, CA 92273  
Cell: (760) 604-3057  
sjimenez52@yahoo.com |
ELECTED OFFICERS

President
BROOKE MANSFIELD-ATHERTON, CCLS
Cell: (530) 519-541; Home: (530) 872-1074
E-mail: baaccsls@gmail.com

Vice President
SANDRA T. JIMENEZ, CCLS
Cell: (760) 604-3057
E-mail: sijimenez52@yahoo.com

Executive Secretary
MARY J. BEAUCROW, CCLS
Cell: (415) 717-5607; Office: (415) 268-7281
Fax: (415) 358-4161
E-mail: marybea@comcast.net

Treasurer
JENNIFER PAGE, CCLS
Home: (415) 898-1010; Office: (415) 721-2040
E-mail: jpage@ix.netcom.com

APPOINTED OFFICERS

Executive Advisor (CEC)
CHRISTA DAVIS
Home: (510) 581-1641; Office: (925) 463-0750
Fax: (925) 463-0407
E-mail: cdavis@staleyjobson.com

Parliamentarian
JULIE EDISIL, CCLS
Home: (530) 892-1049; Cell: (530) 588-2151
Office: (530) 899-0715; Fax: (530) 893-9236
E-mail: julie@persimmonhill.com

Editor-In-Chief (CEC)
IUGENE BORBA, CCLS
Home/Fax: (205) 409-8589; Office: (209) 522-2211
E-mail: iugeneborba@comcast.net

Editor, The Legal Secretary
DEBORAH RICKERT, CCLS
Office: (714) 755-8132; Fax: (714) 755-8290
E-mail: deborah.rickert@lw.com

Educational Program Coordinator (CEC)
J. CORI MANDY
Office: (619) 515-3256; Fax: (619) 398-0146
E-mail: cori.mandy@procopio.com

Historian
CARRIE HUGHES, CCLS
Cell: (925) 768-6547; Office: (925) 930-9090
E-mail: carrielee279@yahoo.com

Legal Specialization Sections Coordinator (CEC)
CHERYL L. KENT, PLS, CCLS
Home: (925) 462-3440; Office: (925) 837-0585
Fax: (925) 523-3086
E-mail: clk@gagenmccoy.com; clkcccls@comcast.net

Career Promotion/Scholarship
DIANA DEMPSEY, CCLS
Office: (925) 930-9090; Cell: (925) 783-9085
E-mail: diana@mtldiallopa.info

Editor, The Legal Professional's Handbook
MARIA BISHOP, CCLS
Home: (925) 283-5226; Office: (925) 284-7788
Fax: (925) 284-7789
E-mail: mbishopcccls@hotmail.com; maria@perezmillerm.com

Editor, Law Office Procedures Manual
ANN BOCCIA ROSADO
Home: (310) 833-9952; Office: (562) 435-8300 x 229
Fax: (562) 435-8304
E-mail: arosado@skies-law.com

Legal Procedure (CEC)
ROD CARDINALE, JR.
Office: (659) 592-8600; Cell: (408) 461-0972
E-mail: rodcardinalerjr@sbcglobal.net

Legal Secretarial Training/Seminar (CEC)
COLLEEN YOUNG
Home: (209) 368-6792; Cell: (209) 609-4042
E-mail: youngt@comcast.net

Professional Liaison/Day in Court
LEANNA PIERCE
Office: (619) 239-0500; Fax: (619) 239-1097
Cell: (619) 248-0970
E-mail: lpierce@hattorneys.com

LEGAL SPECIALIZATION SECTIONS

Coordinator
CHERYL L. KENT, PLS, CCLS
Home: (925) 462-3440; Office: (925) 837-0585
Fax: (925) 523-3086
E-mail: clk@gagenmccoy.com; clkcccls@comcast.net

Civil Litigation
DENISE AGUILAR, CCLS
Home: (714) 670-0215
E-mail: daguilair57@att.net

Criminal Law
LINDA LANE
Home: (619) 248-0739; Cell: (619) 434-6600
E-mail: llane44@yahoo.com

Family Law
JUDITH WILLIAMS
Cell: (530) 519-8973; Office: (530) 534-8973
Fax: (530) 534-6551
E-mail: wpwig2@yahoo.com

Law Office Administration
SARA E. MULL, CCLS
Office: (530) 846-5691; Fax: (530) 846-5738
E-mail: sara@sacvalleylaw.com

Probate/Estate Planning
LINDA MOORE
Office: (619) 232-3122 ext 404; Cell: (619) 723-5336
E-mail: lmoore@stutzartiano.com

Transactional Law
BELINDA OWENS
Home: (619) 229-9233; Cell: (619) 261-9233
E-mail: bowens0913@aol.com

Publications Revision Committee

Editor-in-Chief
MARIA BISHOP, CCLS
Home: (925) 283-5226; Office: (925) 284-7788
Fax: (925) 284-7789
E-mail: mbishopcccls@hotmail.com; maria@perezmillerm.com

Editor, The Legal Professional's Handbook
MARIA BISHOP, CCLS
Home: (925) 281-5226; Office: (925) 284-7788
Fax: (925) 284-7789
E-mail: mbishopcccls@hotmail.com; maria@perezmillerm.com

Editor, Law Office Procedures Manual
ANN BOCCIA ROSADO
Home: (310) 833-9952; Office: (562) 435-8300 x 229
Fax: (562) 435-8304
E-mail: arosado@skies-law.com

Assistant Editor
LISA DE LA O
Home: (818) 787-3979; Fax: (818) 784-8700
E-mail: lisad@issslaw.com

Assistant Editor
KAREN J. JONES
Cell: (818) 269-5750; Office: (310) 284-5695
Fax: (310) 557-2193
E-mail: kjones@proskauer.com

Assistant Editor
CAROL KARWATT
Home: (650) 588-1903; Office: (650) 599-1712
E-mail: carol.karwatt@gmail.com

Assistant Editor
DIANE M. MECCA
Home: (209) 529-3101; Office: (209) 238-0946 ext. 210
Fax: (209) 238-0953
E-mail: diane@friendsandwalton.com

Assistant Editor
LUGENE BORBA, CCLS
Home/Fax: (205) 409-8589; Office: (209) 522-2211
E-mail: iugeneborba@comcast.net

LIAISON TO LAW PRACTICE MANAGEMENT AND TECHNOLOGY SECTION OF THE STATE BAR OF CALIFORNIA

HEATHER EDWARDS
Office: (818) 881-5000 x124
Fax: hedwards@alperbarr.com

CLLS CERTIFYING BOARD

Chairman
MICHELLE RODGERS, CCLS

Members
ELSE DESSERT, CCLS
ANGIE GREGO, CCLS
KARI L. KALISTA, CCLS
HOI YUNG, CCLS

Attorneys
MITCHELL DRISKILL, ESQ.
DALE A. STERN, ESQ.

LSI CORPORATE OFFICE

Administrator
CATHERINE CUNVER, CCLS
Office: (707) 682-6888; (800) 281-2188
Fax: (800) 281-2188
E-mail: lsorg@uddenlinkmail.com
LSI Website: http://www.lsi.org
Support Services

court • process • messenger

Court Filing
Experienced and professional court staff execute each of your assignments as you require. Timely updates of your assignments are communicated in multiple fashions with the originals returned as soon as possible.

PDF/Fax Filing
A convergence of environmental consciousness and superior technology to economically complete court filing assignments easily and quickly. First Legal Network provides a cost efficient solution for filing your documents in any courthouse.

ez–File
First Legal Network is the resource for all of your e–filing needs both at the Federal and State level. A select team of professionals proficient on the rules of each system are at work on your behalf. Upload the documents and Consider It Done!

Court Research
First Legal Network team members are dispatched to research and remit your requested documents. First Legal Network’s team can expedite your requests and respond with the desired information timely so your deadline is met without fail.

Service of Process
Follow–through is the foundation of First Legal’s service of process division. No matter the size of the document to be served, the number of locations, the specific time frame or other numerous intricacies of the service, we’ll find a way. First Legal Network retains a base of experienced process servers at the ready 24/7.

Power of the Network
The Network is a suite of services — Attorney Service, Record Retrieval, Digital Solutions and Investigations — all accessible to our clients with a telephone call or a click at www.FirstLegalNetwork.com.

www.firstlegalnetwork.com
Janney & Janney
attorney service, inc.

Court Services
Process Serving
Fax & E-Filings
Court Research
Skip Tracing
Writs, Levies & Attachments
Photocopy Service
Statewide & Nationwide Services

Los Angeles
1545 Wilshire Blvd., Ste. 311
Los Angeles, CA 90017
(213) 628-6338 Fax:(213) 413-8024

Orange County
840 N. Birch Street
Santa Ana, CA 92701
(714) 953-9451 Fax:(714) 953-2840

Ventura
801 S. Victoria Ave., Ste. 304
Ventura, CA 93003
(805) 650-9077 Fax:(805) 650-9091

Inland Empire
455 W. La Cadena, Ste. 17
Riverside, CA 92501
(951) 369-8369 Fax:(951) 369-4931

San Diego
4891 Pacific Hwy, Ste. 102
San Diego, CA 92110
(619) 231-9811 Fax:(619) 231-9421

Excellent Service • Fast Turnaround • Great Prices

www.janneyandjanney.com