

The LEGAL PROFESSIONAL®

AUGUST 2021



MISSION SANTA CLARA DE ASÍS

READY, SET, JETT!

By Sylvia Neri Marsh, LPI Career Promotion/Scholarship Chair
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*Dedicated to LSI Past President,
Joan M. Moore, PLS, CCLS*

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LYNNE PRESCOTT, CCLS,

is LPI's President, and a member of Sacramento Legal Secretaries Association. She first became a member of LPI in 1990 while working as a legal secretary in Fairfield, CA. She currently is the owner of PLV Legal in Yuba City, CA. Lynne is a two-time past president of both Solano County LSA and Sacramento LSA, and obtained her CCLS certification in 2013. She resides in Yuba City with her husband, Randy, and four fur-babies, and is a proud mother and grandmother.

PRESIDENT'S MESSAGE

BY LYNNE PRESCOTT, CCLS

Did you love Annual Conference? I know I did! You could literally feel the energy and excitement, whether you attended in person or via Zoom. LPI definitely elevated and we thoroughly embraced "The Climb." Highlights from the weekend included:

- The Tech Committee's fabulous Friday Night Virtual Vendor Party.
- The amazing Inspirational Message delivered by Ana Fatima Costa.
- The moving Memorial Address given by LSI Past President Deanna Pepe, PLS, CCLS.
- The rousing General Session Opener spotlighting each local association (who can forget that "Rocky" theme?).
- Kristi Edwards', CCLS, thoroughly entertaining Major League Baseball introduction of the Executive Committee
- The astounding data gathered from all of LPI's committees for FY 2020-2021 reflecting the unprecedented success of our educational and professional development programs (takeaway: LPI is educating a legal professional every four-and-a-half days!).
- The awesome new LPI branded merchandise introduced by Vice President Rod Cardinale, Jr., and Advertising Chair Ron Ackland (now available in the LPI Store).
- The celebration of LPI's CCLSs at the Kalman S. Zemplyny II Annual CCLS Luncheon.
- The gathering of our LSI/LPI Past Presidents for their annual luncheon.
- Awards presented for the Bulletin Contest, Eula Mae Jett Scholarship Program, Membership Gain Contest, and Chapter Achievement Contest.
- Installation of LPI's elected officers and presentation of appointed officers and chairmen making "The Climb" for FY 2021-2022.
- Presentation of Elevate Awards, Leadership Team Award, Rising Star Award, and LPI President's Award.

Thank you to everyone who helped make our 87th Annual Conference so successful, especially Rod and Kim, the Tech Committee, our vendor partners, our registrars, all the associations and individuals who donated so generously with prizes and monetary gifts, the CCLS Certifying Board, the Marketing Committee, our opening ceremonies guests, and to Sacramento LSA for being local ambassadors for LPI. Special thanks goes out to everyone who attended this conference and to everyone who participated. It is your participation and contributions that make LPI great.



Continued on page 3 ➔

← Continued from page 2

If you think our Annual Conference was amazing, then prepare to be wowed by Santa Clara County LPA as they host our First Quarterly Conference, August 27-29, 2021, at the Santa Clara Marriott. Santa Clara County LPA will christen the "S.S. LPI" on her first full, in-person conference since becoming Legal Professionals, Incorporated. Our transatlantic journey begins as we "board" LPI at the beautiful Santa Clara Marriott and head to Latin America! Be sure to get your passport stamped at each exotic port of call! The journey will continue at the November 2021 Quarterly Conference as we cross the Atlantic and head to the United Kingdom. We will then embark for South America for LPI's February 2022 Conference. Your passport should be fully stamped by the time LPI reaches Italy at its 88th Annual Conference in May 2022.

We have indeed emerged in the spring of hope, this 87th year, with everything before us. We continue to look ahead, we continue to climb, and we continue to elevate. Thank you to the officers and chairpersons of LPI for never losing sight of our mission or our purpose. When it seemed like the season of light would never come, you remained steadfast in your commitment to LPI and strong in your belief in what we do and why we do it. You never let our members down.

Finally, I would like to thank you, the members of this organization, for your kind words of encouragement and support to me and the rest of the Executive Committee this past year. Thank you for remaining true to your local associations and understanding the challenges they have faced. Thank you for being part of the solution and for valuing your membership.

I ask that each member make a renewed commitment to LPI and to your local association. Help them to help you. Be there for them so they can be there for you. You are more valuable than you know.

Keep On Moving, Keep Climbing, Keep the Faith, Elevate. It's All About the Climb!

Warmly,



Dates to Remember | 2021

AUGUST 19, 2021 | 12:00 P.M. – 1:00 P.M.
LSS Webinar – Real Estate 101

AUGUST 26, 2021 | 12:00 P.M. – 1:00 P.M.
LSS Webinar – Buckle Up For Safety: The Law Firm's Guide to Handling Catastrophic Personal Injury Litigation

AUGUST 27-29, 2021
LPI's First Quarterly Conference – "Passport to Education"
Santa Clara Marriott
Hosted by Santa Clara County LPA

AUGUST 31, 2021 | 12:00 P.M. – 1:00 P.M.
LPI Webinar – Filing an Unlawful Detainer

SEPTEMBER 16, 2021 | 12:00 P.M. – 1:00 P.M.
LSS Webinar – Understanding the Value of Estate Planning and the Probate Administration Process

SEPTEMBER 18, 2021
CCLS Exam



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LPI's 87TH Annual Conference
Elevate, Part II: It's All About the Climb

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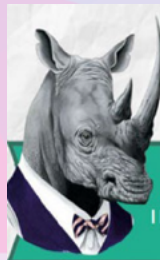
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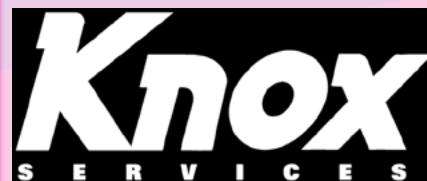
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ALL ABOARD THE S.S. LPI!

FIRST STOP: THE MEXICAN RIVIERA!

BY ELISE DRESSER, CCLS – SUBMITTED ON BEHALF OF SANTA CLARA COUNTY LPA

¡Hola! On behalf of Santa Clara County Legal Professionals Association, we'd like to invite you to join us the weekend of August 27-29, 2022 for LPI's First Quarterly Conference, where we will kick off our "Passport to Education." For the next year, LPI will take you on an international journey starting in Santa Clara, California with a Latin American theme, through the Central Americas and Europe, and ending up in Italy next May 20-22, 2022 for LPI's 88th Annual Conference back in Santa Clara for a *Weekend in Italy!* Conference attendees will be given a passport at the August conference, and if you fill your passport with stamps leading up to the May 2022 Annual Conference, you'll be entered in a drawing for an amazing grand prize! (Hint: it's travel-related!!)

The Santa Clara Marriott is adjacent to California's Great America, and right down the street from Levi's Stadium, home of the San Francisco/Santa Clara 49ers. The hotel is easily accessible from US 101 and only about five miles – about a 10-minute drive - from the San Jose International Airport. Both San Francisco and Oakland Airports are only about an hour away and either could be used for some added sight-seeing! The hotel does not offer an airport shuttle; however, bus service to/from airport is approximately \$2 each way, and taxis are available for approximately \$30 each way.

The Santa Clara Marriott offers express check-in/check-out as well as video check-out; a full service, staffed business center; messenger service; notary; etc. Rooms include complimentary bottled water; coffee maker/tea service; ironing board/iron, mini fridge; down pillows; bathrobe; wet bar; and other amenities.



The scrip ticket is \$165, and the room rate is \$129 for King/\$134 for 2 Queens. Self-parking at the hotel is \$5.00/day.

There are many great things to do within walking distance of the hotel, but if you're feeling adventurous you may want to try a flashlight tour of the Winchester Mystery House, shopping at Santana Row or Valley Fair Mall; fine dining in downtown San Jose or maybe a leisurely stroll through one of the many public gardens or museums. If you're feeling adventurous, take a drive "over the hill" and visit the world-famous Santa Cruz Beach Boardwalk and dip your toes in the ocean!

SCCoLPA is excited to be hosting LPI's first quarterly conference IN PERSON and we hope you'll all be able to join us!



ELISE DRESSER, CCLS, is a Legal

Assistant at the law firm of McManis Faulkner in San Jose, CA. Elise currently serves as an Assistant Editor on the Publications Revision Committee, and has served in many capacities on the board of Santa Clara County LPA, including President from 2016 to 2018. Elise attained the designation of California Certified Legal Secretary in 2009 and has also served as the CCLS Certifying Board Chair for LPI.

READY, SET, JETT!

BY SYLVIA NERI MARSH, LPI CAREER PROMOTION/SCHOLARSHIP CHAIR

EULA MAE JETT

Did you know LPI's scholarship plan was created in 1963? Back then, only second-year female college students could apply for a scholarship. The first place winner was awarded \$250, second place received \$100, and third place received \$75. The plan rules were eventually changed – first to allow male applicants and then to allow high school applicants. In 1974, the plan was formally named the Eula Mae Jett Scholarship Fund, in honor of our founder, Eula Mae Jett (née Smith).

The award amounts changed over the years, as well as the number of awards given. Category C (then called "re-entry level") was added to the plan in 1984. In 1992, the award amounts were increased to \$1,000 each and the plan was updated to allowed court reporters, legal assistants and legal administrators to apply for scholarships. In 2012, the categories were rearranged, the total number of scholarships awarded was set at six (i.e. two per category) and the amount of each award was increased to \$1,500. Changes made in 2013 provided specific California requirements for students. In 2016 it was decided that instead of two awards of \$1,500 each, the first place winner would receive \$2,000 and the second place winner would receive \$1,000. The plan continues to be revised each year based on suggestions from the Executive Committee, local scholarship chairs and LPI members. For the period 2013 through 2021, LPI received 93 scholarship applications and awarded 49 scholarships totaling \$74,000.

Sometimes the applications can be heartbreaking. Do we help the woman who, after living with an abusive spouse for 30 years, left her job and all of her belongings to make a fresh start on the other side of the country? What about the applicant who, at age 17, became

the victim of child pornography through the actions of a friend whom she had known for several years? Then there was the applicant who returned from a business trip overseas to find that her husband had taken their son and refused to tell her where they were. Do we choose the high school applicant who is homeless and has to use his school counselor's work number and email because he has no outside access to a phone or computer? These are just a few examples of actual applications received. I find that when a judge is late returning scoring sheets, it is not because of a busy schedule or family obligations, it is because the judge is having trouble scoring the application based on facts versus emotion.

I find that many associations who do not have a scholarship fund of their own feel that they cannot participate. Nothing could be further from the truth! There are many ways local associations can help struggling students. Have a fundraiser or silent auction or solicit donations to your local scholarship fund. You can provide a deserving student with \$500 or \$300 to help with books or supplies. \$100 can help a commuting student with gas. You can cover the cost of an online LPI class or the cost of a short-term program at your local college. When all else fails, think back to when you were a student. What were some of the things with which you could have used monetary help? Scholarship funds are designed to help the student achieve an end result, whether those funds are used for tuition, books, gas, rent, food or utilities. Regardless of what you decide to award at the local level, or even if you cannot award anything at the local level, you can still submit applications to LPI.

The best way to get the word out about the scholarship program - either your local program or the LPI program



- is to make sure your members are informed! Send out regular emails about scholarship opportunities, make announcements at your meetings, post information on your association's web site and/or social media accounts, and include articles about the program in your association's bulletin. More importantly, make sure the public knows about the program. Contact guidance counselors and teachers, or speak at career day functions or job fairs. Even if you cannot be there in person, print up flyers and ask the event coordinator if someone can distribute them. Talk to the school newspaper editor to see if the school will print an article for you or, better yet, if they will send one of their budding journalists to interview you. Ask your managing partner or office manager if you can put up a flyer in the lunchroom or send a firm-wide email about the program. Talk to your family and friends! You may find that you know someone who has a child, grandchild, niece or nephew who is going off the college, and who would be a perfect applicant.

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I recently had the pleasure of being the guest speaker on "Eye on LPI" to talk about the Eula Mae Jett Scholarship Fund. If you didn't get a chance to watch the Facebook Live event, please check out the video on LPI's YouTube channel. We spoke in depth about the scholarship program and about ways to promote a career in the legal field. I encourage you to reach out to me at scholarship@legalprofessionalsinc.org if you have any questions about the Eula Mae Jett Scholarship Fund or if you need assistance creating your own local scholarship plan.

Legal Professionals Incorporated is passionate about its scholarship program and helping students work toward a career in the legal field. I am passionate about the scholarship program and promoting careers in the legal field. Together we CAN educate the next generation of support staff!



SYLVIA NERI MARSH is LPI's Career

Promotion/Scholarship

Chair, and is a member of Orange County Legal Professionals Association. She first became a member of LPI in 2002 while working as a legal secretary in Lancaster, California. She is currently employed as a paralegal in the Taxation, Trusts and Estates department at Jeffer Mangels Butler & Mitchell LLP in their Irvine office. Sylvia is a two-time past president of Orange County LPA and resides in Rancho Santa Margarita, California.



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ANNUAL CONFERENCE OF DELEGATES AND BOARD OF GOVERNORS MEETING



The theme of LPI's 87th Annual Conference of Delegates and Board of Governors Meeting was "Elevate Part II – It's All About the Climb." The room was full of energy and excitement since we were able to have a hybrid meeting which included a Friday night Virtual Vendor Party, the Board of Governors meeting where several awards were given out for the Membership Gain Contest, Annual Bulletin Contest, Eula Mae Jett Scholarship awards, and Chapter Achievement Contest, the Kalman S. Zemplyny II CCLS luncheon to celebrate the new CCLSs, LPI President's presentation of the Elevate Awards, Leadership Team Award, Rising Star Award and President's Award, and an impromptu banquet. What a great weekend!





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2021 ANNUAL CONFERENCE AWARD WINNERS

PRESIDENT AWARDS

ELEVATE ("ELLY") AWARDS:

Barbara Barregar
Heather Nowak
Larry McGrew
Rod Cardinale, Jr.
Erika Garduno
Marci Frazier
Colleen Young
Jan Kuykendall, CCLS

LPI LEADERSHIP TEAM AWARD:

Legal Specialization Sections - Mary Lou Floyd, CCLS;
Carmen Vasques; Maria Gonzalez, CCLS; Belinda
Owens; Shannon Quigley; Janice Williams; M'Liss
Bounds; Francie Skaggs; and Renee Evans, CCLS

RISING STAR AWARD:

Cyndee Saucedo, CCLS

PRESIDENT'S AWARD:

Heather Edwards

VICE PRESIDENT AWARDS

MEMBERSHIP GAIN

Group A - Desert Palm
Group B - Beverly Hills Century City
Group's C-F - No winners

CHAPTER ACHIEVEMENT CONTEST

Group A - Conejo Valley
Group B - Orange County
Group C - San Francisco County
Group D - Santa Clara County
Group E - No Winner
Group F - San Diego

BULLETIN CONTEST

CLASS A: (0 – 30 MEMBERS)

FIRST PLACE

– Alameda County LPA – Editor, Winnie Owen

SECOND PLACE

– Marin County LPA – Editor, Kristi Edwards, CCLS

THIRD PLACE

– Conejo Valley LPA – Editor, Barbara Haussmann, CCLS



CLASS B: (31 – 65 MEMBERS)

FIRST PLACE

– San Francisco LPA – Co-Editors – Larry McGrew and Kate Cochran

SECOND PLACE

– Orange County LPA – Editor, Danielle Hernandez

CLASS C: (66 – 150+ MEMBERS)

FIRST PLACE

– San Diego LSA – Editor, Michelle Tice, CCLS

2021-2022 EULA MAE JETT SCHOLARSHIP WINNERS

PLAN A – HIGH SCHOOL STUDENT

NO APPLICATIONS RECEIVED

PLAN B – COLLEGE STUDENT

1ST PLACE - \$2,000

Jessica Hernandez-Beltran
Sponsoring Association: Desert Palm LPA

2ND PLACE - \$1,000

Liliana Hernandez-Beltran
Sponsoring Association: Desert Palm LPA

1ST ALTERNATE

Abigail Van Diepen
Sponsoring Association: Stanislaus County LPA

PLAN C – CAREER CHANGE STUDENT

1ST PLACE - \$2,000

Anastasiia Kantceva
Sponsoring Association: Santa Clara County LPA

2ND PLACE - \$1,000

Samantha Husher
Sponsoring Association: Santa Clara County LPA

THROUGH THE YEARS WITH ACLSA/LSI

BY MARY S. ROCCA, CCLS – SUBMITTED ON BEHALF OF ALAMEDA COUNTY LSA



Alameda County Legal Secretaries Association (ACLSA) was formed in 1936. This year we will celebrate 85 years of service to the legal community, and 85 years of providing our members with continuing legal education, networking, and the camaraderie we continue to enjoy these many years later – despite the pandemic.

As you might imagine, ACLSA has quite a storied history with many important achievements along the way.

ACLSA is proud to have had several of its members serve as LSI President:

- Mildred Drost served from 1942-1944 ... then 44 years later,
- Pat Parson served from 1980-1982 ... then 14 years later,
- I was proud to serve from 2004-2006. The years I spent on the LSI Executive Committee were ones of personal growth for me and remarkable growth for our association.

My career in the legal field began two weeks out of high school. In search of a summer job, I went to the unemployment office and, because of my secretarial skills, I was sent to a law office for what I thought was a temporary job until I began junior college in the Fall.

Even though I went to a small Catholic high school, we learned to type on IBM Selectric typewriters. Imagine my surprise when the office to which I was sent still had a manual typewriter! I did not last very long on that assignment. From there, I was sent to a small law office in Downtown Oakland, sharing support duties with a well-seasoned professional legal secretary. Although the training experience was rather painful (more for me than her, I think!), I was determined to learn as much as possible about the legal field and prove my worth.

Luckily, this office had all of the “modern” conveniences I had been used

to in school. It was equipped with the IBM Selectric typewriter – and plenty of carbon paper and erasers! I was thrilled to have an opportunity to take dictation in person utilizing shorthand. It was only later in my career that dictaphones became the rage.

Quite often, the attorney I worked for preferred dictating in person rather than utilizing a machine, which was what I preferred.

Not long after my working career began, I was informed by a co-worker of the existence of Alameda County Legal Secretaries Association. I was delighted when I attended my first meeting and was able to interact with others who worked in the same profession as I. They understood the trials and tribulations of working in a law office – the stress of statutes of limitations and filing deadlines, and the idiosyncracies of some of the local court rules – and some of the attorneys!

This was not only a blessing to me, but my employers soon came to realize the importance of my membership and the networking it provided. Over the years, there were many times when my attorney would say “can you call someone in your little book (the LSI roster) and ask them about filing procedures in **** County?”

The days of carbon paper and double-entry ledger sheets for bookkeeping are over, however, the benefits of membership in our professional organization continue to multiply.

Early on, realizing the multitude of benefits available through membership. I attended my first LSI conference as a delegate for ACLSA and was immediately drawn to the camaraderie, dedication and enthusiasm evident that weekend.

After that, I attended conferences whenever possible. I was hooked!! I had the honor of serving as ACLSA

Scholarship Chairman, and was thrilled to be involved on the State level.

Eventually, I took the plunge and ran for LSI Treasurer. I was defeated by Kay Thornburg; however, I was encouraged to run two years later, and the rest, as they say, is history!

My years as an officer for LSI were some of the best years of my life. It was a time of personal growth working toward the betterment of LSI, and a sense of satisfaction watching our association grow, mature and prosper.

And now, ACLSA and I look forward to the day our very own Donna Day is installed as LPI President!



MARY S. ROCCA,
CCLS, is a native

Californian, born and raised in the Bay Area. Mary attained her California Certified Legal Secretary (CCLS®) designation in 1990. Initially, Mary worked in general practice law firms, however in 1990 she selected the probate/estate planning field as her main focus. After working with Margaret M. Hand for over 20 years as a legal secretary/paralegal and office manager, Mary retired in 2016. Mary has been a member of Alameda County Legal Secretaries Association since 1986 and has an honorary membership in her association. She served as President of Legal Secretaries, Incorporated from 2004 - 2006. Mary has been married to Lou for 47 years, has one amazing daughter and three wonderful grandsons.

THE FOLLOWING ASSOCIATIONS ARE EXPECTED TO SECURE ARTICLES FROM GUEST WRITERS FOR PUBLICATION IN THE MAGAZINE ISSUES SPECIFIED BELOW.

a. *August Issue (to be submitted no later than June 1st):*

Alameda County, Beverly Hills/Century City, Conejo Valley, Contra Costa County, Desert Palm, Fresno County, Humboldt County

b. *November Issue (to be submitted no later than September 1st):*

Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Mt. Diablo, Orange County

c. *February Issue (to be submitted no later than December 1st):*

Placer County, Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco

d. *May Issue (to be submitted no later than March 1st):*

San Gabriel Valley, San Mateo County, Santa Clara County, Santa Cruz County, Santa Maria, Stanislaus County, Stockton-San Joaquin County, Trinity County

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Buckle Up for Safety:

THE LAW FIRM'S GUIDE TO HANDLING CATASTROPHIC PERSONAL INJURY LITIGATION

Presented by Scott Herndon, Esq.

August 26, 2021

12:00 pm to 1:00 pm

- Members of ALL Six (6) Legal Specialization Sections (LSS) - FREE!
- LPI Member/Local Association Member - \$15
- Non-Members or Attorney - \$30
- The price increases \$5 after 8.12.21
- Registration closes 8.19.21



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ANNUAL HOLIDAY MOCK TRIAL TRADITION

SUBMITTED BY SACRAMENTO LSA



John Baldwin, the husband of one of our members, began writing mock trial scripts for Sacramento LSA ("SLSA") in 2005. The mock trials were so popular and so much fun that they became a holiday tradition. The holiday mock trials also include an ornament exchange, as well as the stuffing of Christmas stockings that are donated to the local Loaves & Fishes organization to benefit homeless men, women, and children in the community. Before his passing in 2017, John wrote 10 of the 14 mock trials in our collection and co-wrote another. The remainder of the mock trials were written or co-written by Lynne Prescott, CCLS.

Several of the mock trials were inspired by holiday programs such as: Rudolph the Red-Nosed Reindeer; How the Grinch Stole Christmas; A Christmas Carol; It's the Great Pumpkin, Charlie Brown; The Year Without a Santa Claus; and, Santa Claus is Coming to Town. Others were inspired by fairy tales and even current events.

The mock trials are written so that the actors do not have to memorize lines - - they read directly from the script, which often results in an even better (and more hilarious) delivery. Costumes range from the very simple to the impressive and outrageous! There is always a jury, usually identified by their holiday sweaters and reindeer antlers or Santa

hats. The jurors never receive a copy of the script in order to keep deliberations and verdicts completely impartial and based solely on the evidence and testimony presented at trial. The judge for the mock trial is usually a local attorney, sitting judge, or an LPI officer. One year, we were able to hold the mock trial at a local law firm that actually had a mini courtroom as part of their office that they used to train and prepare their attorneys for trial. This past year, SLISA held its first completely virtual mock trial, and it was still just as fun as ever. Plus, we had the added benefit of members from other associations around the state that joined us for the evening and even played a couple of the characters!



ANNUAL HOLIDAY MOCK TRIAL TRADITION

← Continued from page 24

SLSA's mock trial scripts have all been shared with LPI as part of the Day in Court library and are listed below. They are available upon request to the Professional Liaison/Day in Court Chair or Sacramento LSA.

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • Burgermeister Meisterburger v. Kris Kringle • Father Time (aka "Baby Face New Year") v. Fountain of Youth, Ltd. • Grandma v. Santa • Huff, Finagul, et al. v. Santa Claus • North Pole v. Heat Miser | <ul style="list-style-type: none"> • People v. The Grinch • Santa Claus v. Prince Harry • Penguins of the North Pole v. Santa Claus • Santa v. NORAD • Scrooge v. Marley | <ul style="list-style-type: none"> • The Great Pumpkin v. The Major TV Networks • Rudolph v. Santa Claus, Inc. • Fairy Tale Courtroom – Trial of the Big Bad Wolf • Fairy Tale Courtroom – People v. The Wicked Witch |
|--|---|---|

The mock trials qualify for MCLE and CCLS credit, as well as LPI Chapter Achievement Points since they are considered a Day in Court event. Putting together the mock trial is not hard; it's mostly a lot of coordination and promotion. More importantly, it is one of the most fun, entertaining ways to present continuing education to the legal community.



- 1 - CAST OF BURGERMEISTER MEISTERBURGER
- 2 - JUDGE MARY
- 3 - POLAR BEARS OF THE NOTH POLE
- 4 - OLD CRONE WITCH
- 5 - PRINCE CHARMING
- 6 - THE GRINCH AND SHERIFF OF WHOVILLE
- 7 - YUKON CORNELIUS
- 8 - WINGED MONKEY
- 9 - STOCKINGS FOR THE HOMELESS

CCLS QUIZ

Legal Computations - Math

DIRECTIONS: USING THE TABLE PROVIDED BELOW, DETERMINE THE CORRECT EXECUTOR FEES FOR EACH ESTATE VALUE LISTED. YOU MAY USE A CALCULATOR FOR THIS EXERCISE.

1. \$13,954,573
2. \$736,598
3. \$9,287,529
4. \$243,756
5. \$1,000,072

ON THE FIRST \$100,000 OF THE ESTATE, 4%
ON THE NEXT \$100,000 OF THE ESTATE, 3%
ON THE NEXT \$800,000 OF THE ESTATE, 2%
ON THE NEXT \$9,000,000 OF THE ESTATE, 1%
ON THE NEXT \$15,000,000 OF THE ESTATE, $\frac{1}{2}$ OF 1%, AND
ALL OVER \$25,000,000 TO BE DETERMINED BY THE COURT

DIRECTIONS: PERFORM THE CALCULATIONS NECESSARY TO ARRIVE AT THE CORRECT ANSWER FOR EACH QUESTION BELOW. YOU MAY USE A CALCULATOR FOR THIS EXERCISE.

6. You purchased your house for \$450,000, and it was later reassessed for \$300,000. What is the documentary transfer tax if the tax rate is \$1.10 per \$1000 of the purchase price?
7. You have taken a loan of \$19,000, with interest at 12% per annum. Your minimum payments are \$500 per month. What is your principal balance after 6 months?
8. What is the daily rental rate for a property whose monthly rent is \$1,032?
9. On March 15, 2017, your salary was \$63,900 per year. You will receive a 3% rate every year on January 1. What will your annual salary be on March 15, 2019?
10. If your client does not pay settlement funds of \$32,456 to plaintiff within 30 days of settlement, interest will accrue in the amount of \$15% per annum for each day the payment is late. Your client pays the settlement funds on the 63rd day from the date of settlement. What is the total payment being made?

CCLS QUIZ ANSWERS ON PAGE 26



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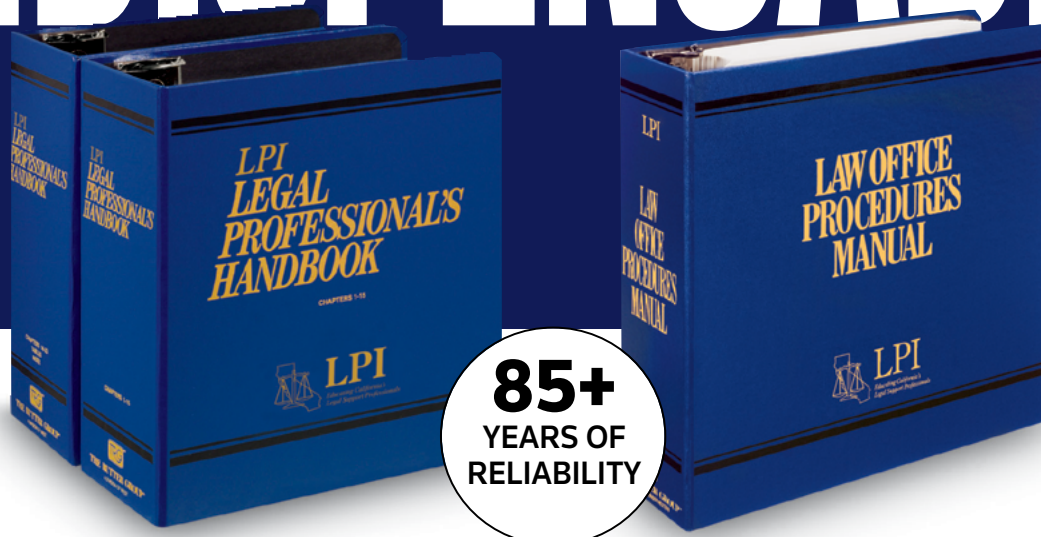
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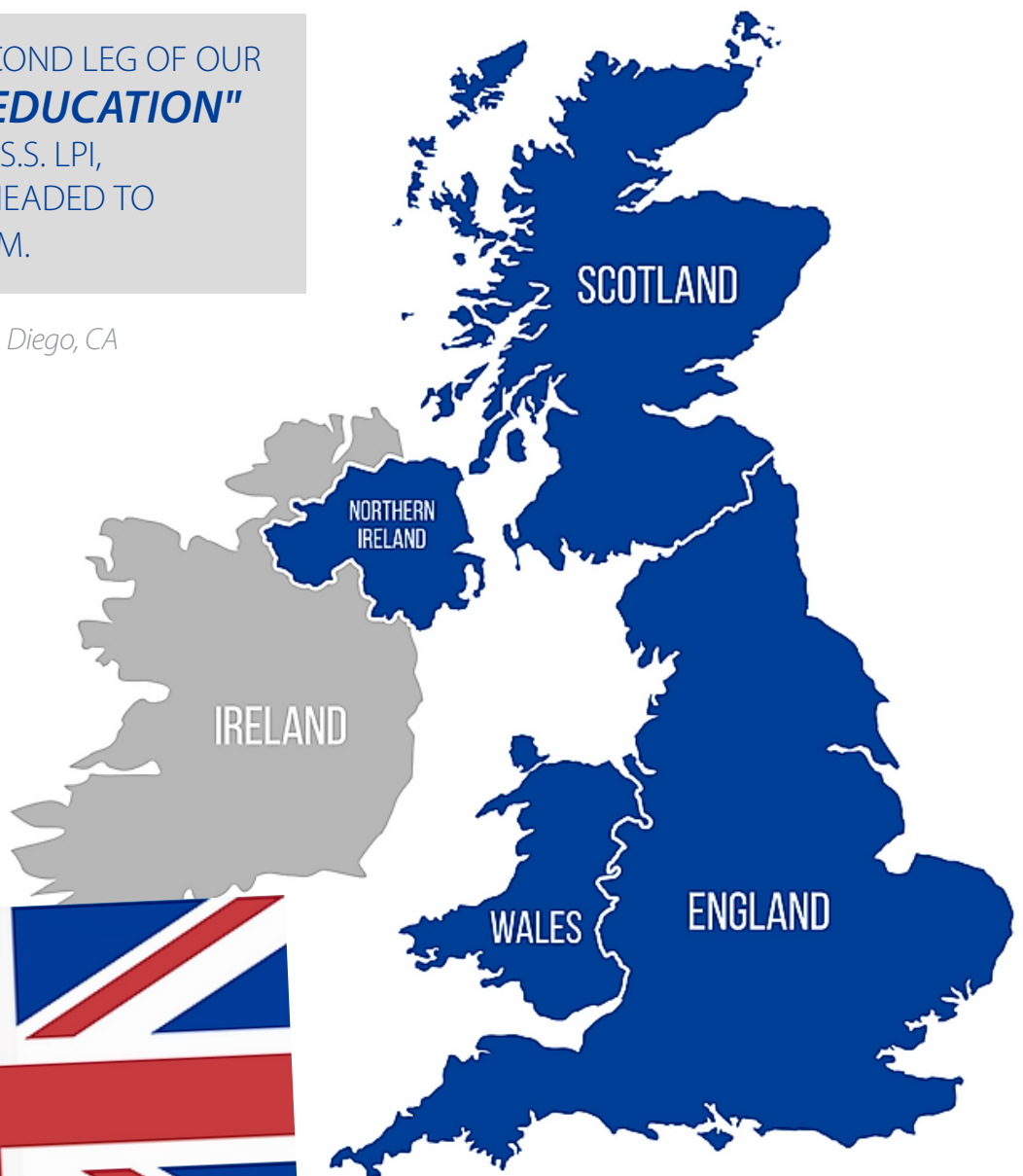
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CCLS QUIZ

ANSWER KEY

- | | |
|-----------------|-----------------|
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| 2. \$17,731.96 | 7. \$17,140 |
| 3. \$105,875.29 | 8. \$34.40 |
| 4. \$7,875.12 | 9. \$67,791.51 |
| 5. \$23,000.72 | 10. \$32,896.22 |

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