

The LEGAL PROFESSIONAL®

FEBRUARY 2023



GPS TRACKING IS ILLEGAL IN CALIFORNIA

by Don Treco, Page 26

Legal Services & Document Retrieval Nationwide - Worldwide



Legal Document Preparation



Legal Document Service



Record Retrieval



National and International



Professional One-on-One Assistance

Electronic Record Delivery
Exceptional Turnaround
Medical Summaries by Our Nurses
User-Friendly Website
Secure and HIPAA Compliant
Significantly More Records

macro[®]*pro*
www.macropro.com 800-696-2511

TABLE of CONTENTS

THE LEGAL PROFESSIONAL MAGAZINE

Published Quarterly by:
Legal Professionals, Incorporated

Editor: Barbara Barregar

Designer: Lori McElroy,
REDROMAN Creative

Printer: ARRAY

Cover Photo: San Mateo Mariott
Image courtesy of Mariott.

LPI CODE OF ETHICS

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

*Dedicated to LSI Past President,
Joan M. Moore, PLS, CCLS*

Copyright © 2023 by Legal Professionals, Incorporated, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. All rights reserved. Reproduction in whole or in part without the express permission of Legal Professionals, Incorporated is prohibited. "THE LEGAL PROFESSIONAL" is a registered trademark of Legal Professionals, Incorporated.

THE LEGAL PROFESSIONAL, published quarterly by Legal Professionals, Incorporated, is a benefit of membership. Subscriptions for members are included in annual dues. Subscriptions are available to non-members, at a cost of \$25 per year (4 quarterly issues), through LPI Corporate Office, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered and is made available with the understanding that the publisher is not engaged in rendering legal or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought. The opinions expressed by the individual authors are their own and are not necessarily those of Legal Professionals, Incorporated.

FEATURES

- 2** President's Message
By Rod Cardinale, Jr.
- 7** Grooving to the 60's
By Tanya Tate
- 9** Working Remotely
By Christie Ensley
- 12** Mandatory Continuing Legal Education (MCLE)
By Renee Evans, CCLS
- 23** One Woman's Journey From Homemaker to a California Certified Legal Secretary
By Karen Rimmele, CCLS
- 26** GPS Tracking is Illegal in California
By Don Treco

EDUCATIONAL OPPORTUNITIES

- 5** LSS Webinar – A to Z: Making Your Way Through a Guardianship Case (March 9, 2023; Noon)
- 6** CEC/Legal Specialization Sections Seminars and LPI Technology Training at February Quarterly Conference (February 25, 2023)
- 8** LPI Technology Training – Excel Formatting (February 28, 2023; Noon)
- 18** LPI's 89th Annual Conference Hotel and Registration Information Hosted by LPI (May 11-14, 2023)

MISCELLANEOUS

- 4** LPI 100% Club Membership WINNERS
- 10** Photos of LPI's Second Quarterly Conference (November 2022)
- 17** Legal Specialization Sections 2022-23 Membership Info.
- 20** CCLS Quiz: Corporate Law
- 21** LPI Acronyms
- 23** Quarterly Assignments
- 24** CCLS Quiz Answer Key
- 27** Introducing the New Educational Silos
- 31** Application to Take CCLS Exam
- 33** LPI Scholarship Information
- 34** 2022-2023 LPI Roster
- 36** LPI Benefits

ADVERTISERS

- IFC** Macro Pro
- 16** Rhino Investigation and Process Serving LLC
- 20** Barkley Court Reporters
- 20** Redroman Creative
- 24** WebEditor Design Services
- 25** Affirm Investigative Solutions
- 28** Sayler Legal Service
- 29** The Rutter Group
- 30** Direct Legal Support
- 32** Commercial Process Serving, Inc.
- IBC** First Legal Network
- BC** Janney & Janney



ROD CARDINALE, JR.

is LPI's President and a member of the Santa Clara County Legal Professionals Association ("SCCoLPA"). He is a Sr. Paralegal and Officer Manager at The Law Office of Janet L. Brewer. Rod served as President of SCCoLPA from 2010-2014. In Rod's spare time he likes to cook, travel, watch sports and spend time with his family.

Stronger
Together

PRESIDENT'S MESSAGE

BY ROD CARDINALE, JR.

The November Conference was held in Sacramento, and Sacramento LSA and Placer County LPA co-hosted it. Crystal Rivera, Corene Rodder, Rachel Malerbi, and all the members of both associations that helped put together the conference did an amazing job. The theme for the conference was Follow the Yellow Brick Road. At the Saturday night banquet, attendees dressed in their favorite Wizard of Oz attire, and all those that wanted to participate in a shoe contest came

with the best (or ugliest) shoes. This was so much fun, and the conference committee deserves kudos for making the evening so much fun. After a vote with colored beads, the winners were announced. I'm not sure if they were all picking on me, but I overwhelmingly won the contest for ugliest shoes with my green suede shoes with rhinestones. All those participating ended up winning, and all received some LPI swag for their efforts.



In addition to all the fun we had at the banquet, we had time to put on six educational opportunities, both in-person and on Zoom. We also had the first-ever opportunity for attendees to drop in and meet one-on-one with LPI's Technology trainer June Hunter and ask any questions they had. This was well received, and I think this is something that we will offer again in the future.

The year 2022 was a great year for LPI. We elected the first male President in the organization's history. The Governors voted to rename LPI's educational system from the Legal Specialization Sections to LPI University, LPI Technology Training, and LPI Continuing Education. We

unveiled the new Legacy Room at the Annual Conference in Santa Clara. We reimagined the structure of our conference starting at the August conference, which has allowed for more networking and education and less time spent in meetings. We have also constructed a marketing plan and strategy to promote LPI and our new educational system.

The Publication Revision Committee finalized transforming the Law Office Procedure Manual into a softbound version. The online version of the Legal Professional Handbook continues to do extremely well, and the royalties reflect all the hard work the committee has put into these publications.

Continued on page 3 ➔

← Continued from page 2

The Continuing Educational Council has continued to offer amazing classes and webinars. In addition to the amazing lineup of educational classes, we started our first-ever Intermediate Legal Professionals Training program on January 11, 2023. In addition, we will offer an Advanced Legal Professionals Training program starting in 2023. LPI will offer our first-ever Writing Class at the March Day of Education. This will be a two-part class, with the first part a basic legal writing class and the second part will be more advanced using IRAC as the guideline.

In my last message, I shared that we would be starting a new membership program that would allow potential new members to join any local association through the membership page of the LPI website and also encourage every non-member to either join a local association or LPI as a Member at Large when registering for any LPI educational class or webinar. We launched this program in October, and at the time I'm preparing this message, local associations have already gained eighteen new members. I hope this number will continue growing in 2023 with all the educational offerings and the new marketing efforts we have stored.

The Marketing Committee is hard at work as I write this message coming up with the new marketing materials that we will start disseminating after the February conference. We are well on our way to our goal of a fifty percent increase in membership over the next year. The hard work done in 2022 sets the stage for an even better 2023 for LPI and the local associations. As always, the best form of marketing is word of mouth. I hope many of your firms qualify for the LPI 100% Club. LPI Vice President will report at the February conference on how many firms joined this exclusive club.

The new year brings new changes to the law. I'm happy to see that many of LPI's local associations had or have planned an event dedicated to the changes to the law for 2023. These events are always well attended and can now be offered in-person and on Zoom. The addition of Zoom meetings only further allows the local associations to draw members and non-members from the legal community to attend.

The new year also means it's almost time for Nominations and Elections. I'm often asked why I made the ten-year commitment to serve LPI on the Executive Committee, and the answer is very simple. I decided to serve LPI because of the experiences I have gained and the relationships I have made. Being part of a board or committee is a very rewarding experience. It is a little bit of work, and there is definitely a time commitment, but the good far outweighs the bad. If you have not considered serving your local association, now is the time to step up. LPI and the local associations are gaining momentum, and there is a new sense of excitement with the new changes starting in May 2023. Reach out to your current board and ask what you can do to help. We can't reach the heights we all want to reach as a corporation without your help.

Have you heard where LPI is hosting our Annual Conference in 2023? If not, I'll let you in on the secret. We will be at The D Hotel in Las Vegas, Nevada. Conference committee chair Marci Frazier and committee members Lynne Prescott, CCLS, Kristi Edwards, CCLS, and Heather Czulger-Nowak are hard at work putting together an incredible conference for us. The theme for the conference will be Stronger Together and will be Mother's Day Weekend, May 11-14, 2023. In addition to all the fun we will have visiting Las Vegas, we will also be unveiling the new annual

conference structure that will allow for less business time and more networking and education.

For the first time, you will have the opportunity to attend four hours of educational classes. We will have two classes on Friday afternoon and four classes on Saturday afternoon. You can find the registration information for the Annual Conference in this issue of The Legal Professional. The room rates for Wednesday and Thursday are only \$49, and Friday and Saturday are only \$114 per night. Book your rooms, buy your scrip tickets, bring your spouse, partner, kids, and friends, and don't forget your moms so they can celebrate Mother's Day with us. The hotel does charge a \$29 per night Resort Fee (includes valet or self-parking, internet, pool, and gym access). The full scrip ticket is only \$197 (includes Registration Fee, Friday Luncheon, Saturday Continental Breakfast, Saturday Banquet, and Sunday Breakfast). You can also purchase an optional Friday Continental Breakfast for \$25 and the Friday Night Social for only \$10. This will be a conference that you won't want to miss.

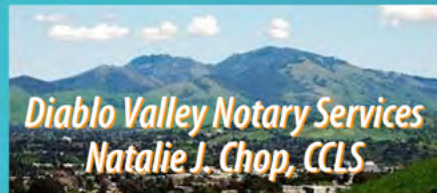
I'm excited about all the new things coming in 2023, and I hope you are as well. If you have not attended a local association meeting or an LPI conference recently or ever, 2023 is the year to either come back or start attending LPI events. The skies are the limit for LPI; remember...

We are Stronger Together!



Congratulations

to our 100%
Club Members!





LEGAL
SPECIALIZATION
SECTIONS

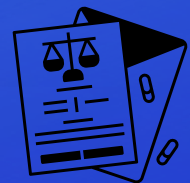
A to Z: Making Your Way Through a Guardianship Case

Presented by: Loni Klein, Esq.



March 9, 2023
12:00 pm to 1:00 pm

- Members of ALL Six (6) Legal Specialization Sections (LSS) - FREE!
- LPI Member/Local Association Member - \$25
- Non-LPI Member or Attorney - \$45
- The price increases \$5 after 02-23-23
- Registration closes 03-02-23



Online registration and payment available at:
<https://www.legalprofessionalsinc.org/events/> or scan the QR code.



**THE LEGAL SPECIALIZATION SECTIONS IS A PROGRAM OF
LEGAL PROFESSIONALS, INC., AN APPROVED PROVIDER, AND
CERTIFIES THAT THIS SEMINAR HAS BEEN APPROVED FOR
MINIMUM CONTINUING EDUCATION CREDIT IN THE AMOUNT OF
1.0 HOUR BY THE STATE BAR OF CALIFORNIA.**

3rd Quarterly Conference - February 25, 2023



Legal Professionals, Inc. Presents LPI Technology Training CEC/Legal Specialization Sections



CEC/LSS Seminars *

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

Changes in the Law - Federal and Employment

Speaker: Jeanine DeBacker, Esq.
(McPharlin Sprinkles & Thomas LLP)

1:45 p.m. - 2:45 p.m.

Changes in the Law - Family Law and Criminal Law

Speaker: Hazel Bradshaw, Esq.
(Johnston Kinney & Zulaica LLP)

3:15 p.m. - 4:15 p.m.

Changes in the Law - State and Probate

Speaker: Azita Rahim, Esq.
(Johnston Kinney & Zulaica LLP)

Pre-register: LSS Members FREE; All others \$15

Walk-ins: LSS Members \$5; All others \$20



1:45 p.m. - 2:45 p.m. - CCLS

Legal Computations

Speaker: Vivian Shreve, CCLS
Chair - California Certified Legal Secretary



LPI Technology Training**

Presented By: June Hunter

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

Getting Documents E-filing Ready

3:15 p.m. - 4:15 p.m.

Intermediate Adobe

Two Classes - One Low Price

LPI Members ~ Pre-register: \$20; Walk-ins: \$30
Non LPI-Members ~ Pre-register: \$35; Walk-ins: \$45

Individual Classes

LPI Members ~ Pre-register: \$15; Walk-ins: \$25
Non LPI-Members ~ Pre-register: \$25; Walk-ins: \$35

LEGAL COMPUTATIONS



**All Seminars Are
Available In Person
or Via Zoom**

The last day to pre-register at the discounted rate is February 15, 2023.

**The 2023 February Quarterly Conference will be held at:
San Mateo Marriott, 1770 S. Amphlett Blvd., San Mateo, CA.**

**To Register go to: <https://www.legalprofessionalsinc.org/events/>
or Scan the QR Code**



*The CEC/Legal Specialization Sections is a program of Legal Professionals, Inc., an approved provider, and certifies that these seminars have been approved for minimum continuing education credit in the amount of 1.0 hour by the State Bar of California.

**Please note: The Adobe classes are eligible for CCLS credit only. MCLE credit is not available.

GROOVING TO THE 60'S

BY: TANYA TATE – SUBMITTED BY SAN MATEO LPA

LPI and San Mateo County Legal Professionals Association are excited to welcome you to our groovy weekend on February 24-26 at the San Mateo Marriott.

You are invited to wear your go-go boots and bell bottoms. Just be cool, relax, and come enjoy the groove. If you don't have a tie-dye shirt, no worries. Dude, there will be some for sale.

We are heading back to the 60s, back to the days when San Mateo County LSA was formed (now LPA). The 1960s were a time of change, a time of peace and love shared with friends. And that's exactly what we plan on doing in February 2023 bringing it back to the 60s. Now you can argue that there was a war going on, but we are focusing on the peace and the love.

Friday night we invite you to come and rock the night away, literally, while we paint some rocks and eat some munchies with our friends. The \$25 fee will cover three rocks which you can paint and design anyway you want and take it home with you. Your own souvenir pet rocks or painted rocks from our weekend Grooving in the 60s.

On Saturday with the new format, we will be having a continental breakfast to enjoy before the Board of Governors meeting. After the Board of Governors meeting on Saturday, we will all attend the group Roundtable Luncheon. Bring your questions and answers to discuss at the luncheon to prepare for voting on Sunday at the Board of Governors Meeting.

The Legal Specialization Sections and LPI Technology Training has planned some excellent educational opportunities, and I hope everybody can attend. You should have received emails with the schedule and hopefully you signed up. There is usually limited space for walk-ins.

If you're not planning on attending any educational workshops, there's lots to

do in San Mateo County. You will be provided a wine map of the wineries located in San Carlos just a \$20 Uber ride down the road where you can walk to several wineries and enjoy winetasting and maybe even bring back some local wine. Downtown San Mateo is not too far and has many stores and restaurants to browse in. Hillsdale Mall is just a couple miles down the road and you can shop or eat. Feeling adventurous? It is only 11 miles out to the San Mateo County coast of Half Moon Bay.

The call for nominations for elected office was previously noticed by the LPI Executive Advisor, Lynn Prescott, CCLS and those whose names have been submitted will be included in the slate of all nominees announced at the February conference. Additionally, LPI Executive Secretary, Bettina Jacobson, has issued a call for bids to host quarterly and annual conferences with bids to be received by the LPI President by hand no later than 9 AM on Saturday. All bids received will be announced at the Sunday morning session of the Board of Governors meeting.

Please be sure to support our vendor partners and exhibitors and visit them over the weekend. They are all super excited to meet you and be sure to tell them how much we truly appreciate their support.

As usual, we will be having an opportunity to buy tickets for our super cool door prize items. You can't win if you don't play!

Saturday nights groove will begin at 6 PM and the reception will be in the banquet room on the first floor of the Marriott. Get there early and grab your seat and have some fun. Remember we're grooving in the 60s. Wear your jeans and tie-dye shirts or wear your mini skirt and go-go boots. It's the 60s. You do you. It's all cool. After dinner, we will have a toast to all of those that have helped make this conference possible and then we will start grooving.



Bring your song requests and we will play it if we can find it on the internet.

Get a great night sleep because at 9AM we start all over again. Breakfast starts at 8 AM and we will continue with the Board of Governors meeting and vote on the recommended Bylaw changes. We should all be ready to vote because we will discuss them at length during the Saturday luncheon.

We look forward to seeing you in February and grooving all weekend back in the 60s. We hope that you all go home with more knowledge, love, peace, and happiness in your life.

Peace and Love, SMCLPA



TANYA TATE is the currently serving as Governor and Second

Vice-President of San Mateo County Legal Professionals Association and has served as President six times after becoming a member of LSI/LPI in 1986. She is an Assistant Editor for the PRC and has served as an LSS Leader. She has been working the law field for 45 years, specializing in family law and currently works for three solo practitioners that practice all areas of law. She is the co-chairperson of the LPI 3rd Quarterly Conference.



FEBRUARY TECHNOLOGY TRAINING

Presented By:
June Hunter

EXCEL Formatting



February 28, 2023
12:00-1:00 PM

LPI Member - \$25
Non-LPI member - \$45

Join us as we learn new skills and uncover
the tools available to properly format
your Excel Spreadsheets.

Everything you've ever wanted to know
about formatting in Excel.



To Register go to our website:
<https://www.legalprofessionalsinc.org/events>
or Click the QR code above.

No cancellations or refunds are provided after the webinar; however, should a
cancellation occur at least 48 hours before the live webinar, LPI will issue a full refund.

For further information or group registrations email: training@legalprofessionalsinc.org



About the Trainer

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

June Hunter is an affiliate of Legal Professionals, Incorporated, an approved provider, and certifies that
this activity is approved for 1.0 hours of CCLS credit. This webinar does not qualify for MCLE credit.

WORKING REMOTELY

BY CHRISTIE ENSLEY – SUBMITTED BY PRACER COUNTY LPA

I'm guessing that most, if not all of us in the legal field, worked either entirely remotely or partially remotely during the COVID-19 pandemic. I have been a remote worker for three years now and started working remote just prior to the Covid-19 outbreak, in January of 2020. This is my story and how I feel I have been successful as a remote paralegal, and spoiler alert, I moved to Tennessee this year and still work for and support two attorneys in California who practice in estate planning, probate, and trust administration. We work with clients throughout California. For about two and a half years I worked remotely while living in California and then in June of 2022 we moved to Tennessee.

I believe there are a few important things that you need to be successful as a remote worker. The top items that come to mind are having a functional home office set up that is conducive for at-home work and good time management skills so you can stay on task, proper training of support staff that work in the office that can assist you, and a good working relationship with the attorney or attorneys that you support.

First, I feel that to be successful as a remote worker you need to have a home office that will set you up for success, such as a quiet place away from distractions. This doesn't always mean having a separate room but at least a quiet place that you can call your own during work hours. I am very fortunate to have a separate home office, so this helps keep me from other distractions that may go on in my home. I find that I am a lot more productive at home than when I was working in the office, as there are pretty much no interruptions or distractions. Also, staying on task so that you can make necessary deadlines and complete items timely. I find that making a "to do" list at the start of each

day helps me stay on task and, if need be, I just carry items over to the next day.

Secondly, support staff that work in the office are an important factor in remote work and assuring they are trained properly so that the team can be successful. Some of the tasks that I did when I was working in the office was preparing final estate plan documents for client signing and processing transfer deeds for recording with the appropriate recorder's office. Since I can no longer travel to our office in Roseville, I worked with and trained other support staff to take on these responsibilities.

Last, but one of the most important pieces of the puzzle to being successful as a remote worker, is to have good communication and a good working relationship with the attorneys that you support. I have been working with one attorney for about eight years, and we brought in an "of-counsel" attorney in 2021 that works with our Southern California estate planning clients. Since I am on Eastern time and am three hours ahead of California, a lot of our communication is by email. This seems to work well but we never hesitate to pick up the phone if we need to discuss something in greater detail or if the attorney needs a rush item, they will usually let me know by phone call or text message.

Remote work may not be for everyone, as some desire the social aspects and comradery of working with others in an office environment, and some even feel a loneliness when working by themselves. So, individual personality does play a big role in whether or not a remote work environment will be successful for you. Also, the type of work and responsibilities you have within your law firm may not be conducive for remote work.



In closing, so far, I really enjoy being able to work remotely and feel like it has been successful, even while living out of state. I feel like I am more productive than when I worked in the office and can complete several hours of work before my California co-workers even wake up to start their day.



CHRISTIE ENSLEY

has been in the legal field for 12 years and has worked as a paralegal at the law firm of Cole Huber LLP in Roseville, California, for the last eleven years. She has been a member of Placer County Legal Professionals Association for eleven years and has held the offices of secretary and president. She currently serves as their executive advisor. She lives in Knoxville, Tennessee with her husband, Jeff.

NOVEMBER 11-13, 2022 | SACRAMENTO, CA

LPI'S SECOND QUARTERLY BOARD OF GOVERNORS MEETING



LPI's Second Quarterly Conference was co-hosted by Placer County LPA and Sacramento LSA at the Hilton Arden West in Sacramento. We did "Follow the Yellow Brick Road" and had loads of fun doing it!

After the Friday night reception, they hosted an Extreme Game Night where fun and frivolity ensued. On Saturday morning the first session of the Board of Governors Meeting was held. Afterwards, several educational and technology workshops were offered that morning and later in the afternoon after the Roundtable Luncheon where the EC Resume was discussed. A highlight was the Saturday evening banquet with costume and best shoe design contests. Attendees awarded their favorites with gold beads (best in show), emerald beads (best

in theme), and purple beads (ugliest). There were good witches, bad witches, lions, a scarecrow, tin man, the great and powerful Oz (he wishes!), Auntie Em, and a munchkin! After dinner the dancing started and continued into the night until everyone was mumbling "there's no place like conference, there's no place like conference!"

On Sunday morning the second session of the Board of Governors Meeting was held where several LPI Bylaw and Standing Rule amendments were voted on.

There truly is "No Place Like Home" except when we are able to get together with our LPI family and friends! Until next conference...



MANDATORY CONTINUING LEGAL EDUCATION (“MCLE”)

BY: RENEE EVANS, CCLS, LPI CONTINUING EDUCATION COORDINATOR

As you all know, LPI is an MCLE provider approved by the State Bar of California. When LPI or a local association has a meeting, seminar, or webinar and you are using LPI’s MCLE provider number (LPI’s MCLE provider number is 1114), there are several rules that everyone must follow for LPI to stay compliant with the State Bar regulations.

Per Rule 3.601 of the Rules of the State Bar:

- A. The MCLE activity must relate to legal subjects directly relevant to licensees of the State Bar or have significant current professional and practical content (i.e., the topic should be presented as if it is being taught to an attorney, not legal secretaries, or paralegals).
- B. The presenter of the MCLE activity must have significant professional or academic experience related to its content.
- C. Promotional material(s) (i.e., your flyer and online posting(s)) must state that the MCLE activity is approved for MCLE credit or that a request for approval is pending; specify the amount of credit offered; and indicate whether any of the credit may be claimed for required MCLE in legal ethics, elimination of bias, or competence issues.
- D. If the activity lasts one hour or more, the provider must make substantive written materials relevant to the MCLE activity available either before or during the activity. Any materials provided online must remain online for at least thirty calendar days following the MCLE activity.

- E. Programs and classes must be scheduled so that participants are free of interruptions.
- F. On and after January 1, 2022, for all training dealing with, or including a component dealing with, implicit bias and the promotion of bias-reducing strategies, an MCLE provider must meet the requirements of Business and Professions Code section 6070.5.

Here is sample MCLE language for your promotional materials:

Legal Professionals, Inc. is an approved provider, and certifies that this seminar has been approved for minimum continuing education credit in the amount of 1.0 hour by the State Bar of California.

Use this language for seminars/webinars that include Ethics credit:

Legal Professionals, Inc. is an approved provider, and certifies that this seminar has been approved for minimum continuing education credit in the amount of 1.0 hour, of which includes 1.0 hour of Ethics, by the State Bar of California.

Use this language for seminars/webinars that only qualify for CCLS (No MCLE):

This webinar is approved for 1.0 hour of CCLS credit. MCLE credit is not available.

The following documents must be sent to me no more than two (2) weeks after your meeting, seminar or webinar as the State Bar may choose to audit LPI at any time.

- 1. Record of Attendance (list of people that attended that need MCLE credit *(new Record of Attendance form attached)*)
- 2. Evaluation forms *(new Evaluation Form attached)*
- 3. Written materials, handouts, agendas
- 4. Any promotional materials (i.e., your flyer)

I have also attached the *new* MCLE form for your reference. You can find these forms online under the Members Only Content / LPI Forms. You also have the option to create and use your own forms, but each form must include the same fields found on these samples.

If you have any questions, you are always welcome to contact me.



RENEE EVANS is currently LPI’s Continuing Education Coordinator. She

has been a member of San Diego Legal Secretaries Association for over 25 years, and served as their president in 1995–96 and again in 2016–17. She is currently an Intellectual Property litigation secretary with Pillsbury Winthrop Shaw Pittman LLP in downtown San Diego.

Continued on page 11 ➔

OFFICIAL RECORD OF ATTENDANCE FOR CALIFORNIA MCLE

Provider: _____
Subject Matter/Title: _____
Date and Time of Activity: _____
Location: _____
Length of Activity: _____

ELIGIBLE CALIFORNIA MCLE CREDIT:

TOTAL HOURS:

Legal Ethics: _____
Law Practice Management: _____
Civil and Criminal Remedies Available for
Civil Rights Violations: _____
Eliminations of Bias in the Legal
Profession: _____
Prevention, Detection and Treatment of ...
Substance Abuse: _____
Emotional Distress: _____

Name of Attendee	California State Bar No.	Attendee Signature

REMINDER TO PROVIDER: Keep this record of attendance for 4 years after the date of completion of this activity.

ACTIVITY EVALUATION FORM FOR CALIFORNIA MCLE

Please complete and return to Provider (*please print*)

Provider Name: _____ Provider Number: _____

Title of Activity: _____

Date(s) of Activity: _____

Time of Activity: _____

Location of Activity: _____

Please indicate your evaluation of this course by completing the table below

Question	Yes	No	Comments
Did this program meet your educational objectives?	<input type="checkbox"/>	<input type="checkbox"/>	
Were you provided with substantive written materials?	<input type="checkbox"/>	<input type="checkbox"/>	
Did the course update or keep you informed of your legal responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>	
Did the activity contain significant professional content?	<input type="checkbox"/>	<input type="checkbox"/>	
Was the environment suitable for learning (e.g., temperature, noise, lighting, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	

Please rate the instructor(s) of the course below

Instructor's Name and Subject Taught	On a scale of 1 to 5, with 1 being Poor and 5 being Excellent, please rate the items below	Rate 1 – 5
	Overall Teaching Effectiveness	
	Knowledge of Subject Matter	

Instructor's Name and Subject Taught	On a scale of 1 to 5, with 1 being Poor and 5 being Excellent, please rate the items below	Rate 1 – 5
	Overall Teaching Effectiveness	
	Knowledge of Subject Matter	

Instructor's Name and Subject Taught	On a scale of 1 to 5, with 1 being Poor and 5 being Excellent, please rate the items below	Rate 1 – 5
	Overall Teaching Effectiveness	
	Knowledge of Subject Matter	

CERTIFICATE OF ATTENDANCE FOR CALIFORNIA MCLE

Sections 1 and 2 must be completed by Provider

1. PROVIDER INFORMATION (please print) _____

Provider Name: _____

Provider Number: _____

Title of Activity: _____

Date(s) of Activity: _____ Time of Activity: _____

Location of Activity (City/State): _____

2. ACTIVITY INFORMATION _____

This Activity qualifies for:

☐ Participatory Credit ☐ Self-study Credit

Total California MCLE Credit Hours for the above activity: _____, including the following sub-field credits:

☐ Legal Ethics: _____

☐ Recognition and Elimination of Bias: _____

☐ Implicit Bias: _____

☐ Competence Issues: _____

Provider Signature (authorized representative): _____

Section 3 is to be completed by the Attorney after participation in the above-referenced activity

3. ATTORNEY INFORMATION (please print)

Name of Attorney: _____

Attorney California State Bar Number: _____

By signing below, I certify under penalty of perjury that I participated in all of the activity described above and am therefore entitled to claim the California MCLE credit hours noted above.

Attorney Signature: _____

CALIFORNIA

- ◆ Process Serving
- ◆ E-filing
- ◆ Investigation



1-833-711-3400



www.llegalassistance.com | info@llegalassistance.com



LEGAL SPECIALIZATION SECTIONS

TIME TO RENEW OR JOIN!

The LSS is a program of Legal Professionals, Inc. (LPI)*, dedicated to providing continuing legal education for legal professionals.

*Membership in the Legal Specialization Sections is separate from membership in LPI and requires a separate application and fee process.

Visit <https://www.legalprofessionalsinc.org/> for pricing & membership.

Continuing Education for the Legal Professional

COST

FOR LPI MEMBERS:

- \$75 ALL 6 SECTIONS
- \$20 INDIVIDUAL SECTIONS

FOR NON-LPI MEMBERS:

- \$150 ALL 6 SECTIONS
- \$40 INDIVIDUAL SECTIONS

BONUS!

**JOIN ALL 6 SECTIONS
AND LSS LIVE
WEBINARS ARE
INCLUDED FOR FREE!**

BENEFITS

- MCLE HOURS
- CCLS HOURS
- MONTHLY & QUARTERLY WEBINARS
- QUARTERLY ROSTER FOR NETWORKING

SECTIONS

- Civil Litigation
- Criminal & Family Law
- Federal Law
- Specialty Law
- Probate & Estate Planning
- Law Office Administration



Stronger
Together



LPI

*Educating California's
Legal Support Professionals*

89TH ANNUAL CONFERENCE

May 11-14, 2023

**Experience LPI
"Stronger Together"**

*Las Vegas
Style*



The D Hotel
301 E. Fremont Street
Las Vegas, NV 89101
(702) 388-2208

HOTEL RESERVATIONS:

www.theD.com

Group Code: DCLP123

RESERVATION DEADLINE: APRIL 10, 2023

**Room Rates* - King/2 Queens
(Single/Double Occupancy)**

Thursday, May 11, 2023 (\$49)

Friday, May 12, 2023 (\$114)

Saturday, May 13, 2023 (\$114)

* A \$29.95 resort fee plus a 13% tax will be added to all reservations. Additional charge of \$20/person/night for triple or quadruple occupancy.

Resort Fee Includes the Following Amenities:

- Free High-Speed WiFi Access
- Complimentary Valet & Self-Parking
- Complimentary Fitness Room Access
- Access to Stadium Swim, plus early entry



FIRSTLEGAL

LPI Joint Venture Partner and
Annual Conference Kick-Off Party Host

Legal Professionals, Incorporated



**LPI'S 89TH
ANNUAL CONFERENCE**
May 11-14, 2023

The D Hotel
301 E. Fremont
Street
Las Vegas, NV 8910

Register at: www.legalprofessionalsinc.org/events

Early Registration Deadline: April 7, 2023

Full Scrip Ticket: \$197*

Includes Registration Fee, Friday Luncheon, Saturday Continental Breakfast, Saturday Banquet, and Sunday Breakfast

Individual Pricing:

Registration \$30.00 (After 4/7/2023 = \$40.00)
Optional Friday Continental Breakfast \$25.00
Friday Luncheon \$30.00
Friday Night Social \$10.00
Saturday Continental Breakfast \$25.00
Kalman S. Zemplyny II CCLS Luncheon \$50.00 (Saturday)
Saturday Evening Banquet \$80.00
Sunday Breakfast \$42.00

**Price indicated is for early registration. Add \$10 for registration received after April 7, 2023.*

Questions? Contact Conference Chair Marci Frazier at (773) 716-9648 or marcifrazier1@gmail.com



FIRSTLEGAL

LPI Joint Venture Partner and
Annual Conference Kick-Off Party Host



Focus on Getting the Testimony You Need at Your Next Remote Deposition

with



REMOTE EXHIBIT MANAGER SERVICES

Let Barkley's expert Remote Exhibit Technicians empower you to:

- ✓ Introduce exhibits dynamically in response to testimony
- ✓ Zoom in and highlight key exhibit information
- ✓ Examine spreadsheets and columns of data more closely
- ✓ Record the deponent's exhibit annotations

CALL (800) 222-1231

Barkley.com

MARKETING DESIGN | TRIAL GRAPHICS | PRESENTATIONS

Simplicity

IS THE ULTIMATE SOPHISTICATION

— Leonardo da Vinci



LORI M^CELROY, *Creative Director*

redromancreative@gmail.com | 619 772 3335 | www.redromancreative.com

CCLS QUIZ

CORPORATE LAW

1. How often must an LLC file a Statement of Information?
2. What are the types of corporations?
3. What are the categories of nonprofit corporations?
4. What is the role of the Shareholders of a corporation?
5. What is the role of the Officers of a corporation?
6. What is the role of the Directors of a corporation?
7. What is the agreement that concerns the affairs of the LLC and conduct of its business?
8. When must an initial statement of information be filed?
9. What words may NOT be used in the corporate name without prior approval?
10. What is the document that begins the existence of an LLC?

CCLS QUIZ ANSWERS ON PAGE 24

LPI ACRONYMS

BLST – *Beginning Legal Secretary Training Association*

CCLS – *California Certified Legal Secretary*

CEC – *Continuing Education Council*

EC – *Executive Committee*

LOPM/LPH – *Law Office Procedures Manual/
Legal Professional's Handbook*

LSA/LPA – *Legal Secretaries Association/
Legal Professionals*

LPI – *Legal Professionals, Incorporated*

LSRG – *Legal Secretaries Reference Guide*

LSS – *Legal Specialization Sections*

PRC – *Publications Revision Committee*

ONE WOMAN'S JOURNEY FROM HOMEMAKER TO A CALIFORNIA CERTIFIED LEGAL SECRETARY

BY: KAREN RIMMELE, CCLS – SUBMITTED BY SAN DIEGO LSA

My name is Karen, and this is my journey. As a young child and throughout my teenage years, my family and friends thought that I would eventually go into law and perhaps become an attorney. I rarely accepted anyone's answers to my many questions as the final word. I had to discuss it further, research it, research it some more, go back and discuss it again. Then finally the conversation would arrive at a place where they would either adopt my beliefs, or we would agree to disagree. I thought everyone processed information in this manner. I quickly found out that not EVERYONE appreciates this type of communication. It's been a lifelong pursuit to be comfortable with this gift, yet it is how God made me.

Well, my life's course took a different path than I was expecting of going to college and pursuing a career in the legal field. I graduated from high school early, got a job in inventory control and purchasing, got married, started a retail sign installation business with my husband and had three sons. I home-schooled my sons off and on for many years and we started a few more businesses (including a couple frozen yogurt shops). I oversaw all aspects of the administrative responsibilities and accounting for our small businesses.

Fast forward to 2016, I am 54 years old, my sons are grown, and I am going through a divorce after being married for 32 years. I am living on my own for the first time in my life, no job, no prospects, not much financial support, no savings; and scared out of my mind. The one skill I did feel comfortable with was my bookkeeping abilities, having overseen our business and personal finances for 32 years. I prayed, surrounded myself with a new support

network, and set out to find my way in this new life of mine. I gained a couple bookkeeping clients, joined a business-to-business networking group and I was on my way.

A few months into this new bookkeeping venture, I ran into an attorney at a local business. We struck up a conversation and found that we had some similarities. For one, we were born in the same hospital (12 years apart) and we both had spent time in the Los Angeles area. We parted ways after our appointment, but I could not get this "chance" meeting out of my mind. I reached out to the woman at the business where I had met the attorney, and with his permission, she gave me his name and number. I called him "out of the blue" one weekend and asked if we could meet for a cup of coffee. He replied "Yes." and that he would call me to set up an appointment. Three weeks passed and no appointment, no contact. I second guessed my intuition a few times during those three weeks. Then I received a text from the attorney, asking if I could meet him that same day for lunch. I accepted, prayed, and went to the meeting. At that meeting, I shared a little about where I was in life and that I had just started a bookkeeping business. His reply was "My bookkeeper quit this morning. Would you like to be my bookkeeper?" BINGO, PRAISE GOD, a new piece to the puzzle of why our paths crossed that day three weeks prior. I accepted and went to work for him the next week. I worked two days a week with the attorney and his paralegal. I didn't even know how to operate the copy machine or the telephone when I started. I felt very inept and a little embarrassed, but I KNEW this was where I was supposed to be at this time.



My two part-time days quickly morphed into three, then four, then five full time days. Sometimes very long days. I began assisting the attorney and his paralegal with whatever tasks they requested of me. No two days were alike. The newness of each day was both frightening and exhilarating.

I was learning from a 35 plus year trial attorney and an attorney functioning as a paralegal. It was a dream come true and yet extremely difficult. All the while I knew what a gift this was and thankfully received their teaching. After two years, the paralegal put in her resignation, as she was moving out of the area. The attorney approached me and asked if I would like to take over her position and he said that he would train me. WHAT??!! The answer was a resounding, "Yes!" Let the next leg of my legal journey begin! I have been assisting this attorney, while learning and growing for the past five years.

In 2018, I met Carla Clark, CCLS, the owner of Alexander's Legal Seminars and Publications and a member of the board of San Diego Legal Secretaries Association. She invited me to attend her civil litigation procedure training course and provided me with her manual. I jumped on the offer and

Continued on page 23 ➔

← Continued from page 22

gleaned all that I could retain from that training. In 2019, she invited me to attend a 10-week study course for the California Certified Legal Secretaries exam. I attended this course, studied hard, and prepared for the exam. Then COVID hit! The exam was continued to the next scheduled date. I joined the next SDLSA Study Group and spent another 10 weeks studying. And then the exam was continued again!

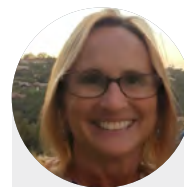
The exam day finally arrived in 2021! It is an all-day exam, encompassing seven separate legal sections. It was very difficult. It was also the first time it had been given via Zoom. I PASSED!

I learned so many valuable skills, and practical knowledge from the study groups. We studied the Law Office Procedural Manual (LOPM) which is a treasure trove of legal information on several practice areas. I am now a California Certified Legal Secretary, a CCLS! A very coveted and honored designation within the California legal support community.

With this knowledge and certification under my belt, in late 2021, I decided to apply to USD's paralegal program. I was accepted and spent the next year cramming paralegal courses into my now full schedule of working for my attorney and keeping up with a thriving bookkeeping business. On September 1st, 2022, I completed and received my certificate from the USD School of Law ABA approved Paralegal Program.

I share all of this to convey my deep gratitude for all who helped me along the way, especially Carla Clark, CCLS, SDLSA's presiding president. She gives her blood, sweat, tears and talents to the furthering of the legal secretary's profession. I'd also like to thank all the men and women in my CCLS exam study groups, Legal Professionals Incorporated, the CCLS certifying board and all who selflessly donated their time and talents to create the CCLS program.

I hope we all never give up on our hopes and dreams, no matter what!



KAREN RIMMELE,
CCLS is a legal

secretary/paralegal at the Law Office of Anton C. Gerschler. She received her California Certified Legal Secretary certification from LSI in 2017. She is San Diego LSA's current Director and Membership Chairperson.

QUARTERLY ASSIGNMENTS | 2022-2023

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

CCLS QUIZ

ANSWER KEY

1. Every other year
2. Stock, nonprofit, and professional
3. Mutual benefit, public benefit, and religious
4. Shareholders are the owners of the corporation
5. Officers run the day-to-day operations of a corporation
6. Directors manage the business and affairs of the corporation
7. Operating Agreement
8. 90 days after filing original articles
9. Bank, trust, trustee
10. Articles of Organization

WebEditor
Design Services
est. 1995

Scott Herman
716-694-9992
www.webeditor.com
info@webeditor.com



**LPI has relied on
WebEditor since 2008.**
You should too!





Affirm Investigative Solutions, LLC, is a full-service investigative company that partners with law firms in handling their investigative and information-gathering needs.

Our Services:

- **Asset Searches**
- **Background Checks**
- **Fraud Investigations**
- **Locates/Skip Trace**
- **Scene Investigations**
- **Surveillance**
- **And more!**



Contact us:



(949) 993-8789



www.affirmmpi.com

**"WE DO THE TEDIOUS INVESTIGATIVE WORK SO YOU CAN
FOCUS ON WINNING YOUR CASE."**

CA PI NO. 188583

GPS TRACKING IS ILLEGAL IN CALIFORNIA

BY DON TRECO – SUBMITTED BY PLACER COUNTY LPA

It is ILLEGAL in California to put a GPS tracking device on a car unless you have the registered owner's permission. That pretty much limits it to a parent tracking a teen driver or a spouse when the car is registered to that same spouse/client, or an employer wanting to track an employee in a Company vehicle.

And then there's the gray area of when a vehicle is registered to both parties such as "John and Jane Doe" or "John OR Jane Doe."

If the car has dual registration, you would absolutely need BOTH spouses permission to put a tracker on the car. So generally, if the vehicle has both spouses name on the registration DO NOT put a tracker on the car, even if you're one of the registered spouses.

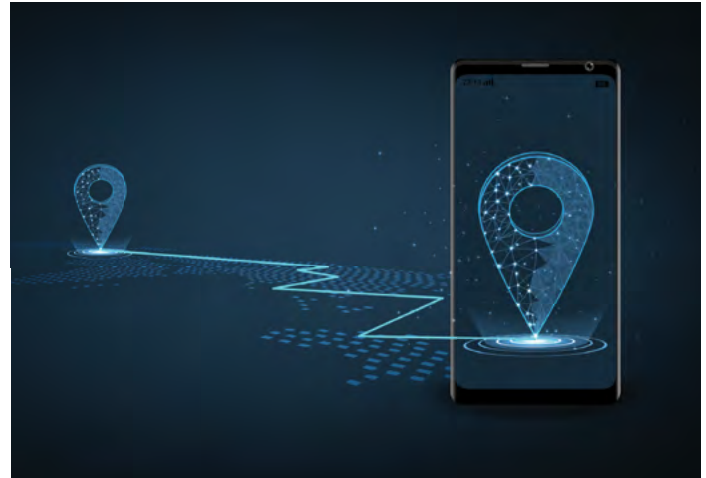
The APPLE AIR TAG is included in this! It is an "Electronic Tracking Device" and is ILLEGAL in California unless you have the other person's consent. Apple knows this too which is why they market it as a device to "find your keys" or other belongings. (Apple knew darn well it would be used for tracking people and don't think for a moment that Apple isn't using it for its own tracking and "analytics.") Criminals LOVE the Apple Air Tag so they can stalk potential rape victims or children for Child Trafficking, and more!

So, when a parent puts an Apple Air Tag or other such device in their child's backpack to "track the child", which in itself is legal, when that child is dropped off for visitation with the ex and is sitting in the back seat of the ex's vehicle, the ex is now being tracked ILLEGALLY. And the parent that placed the Air Tag with the child can now be charged with a crime.

SO WHY ARE GPS TRACKERS SOLD IN CALIFORNIA? Short Answer: Because people will buy them...and its about making money.

HERE'S THE LAW IN CALIFORNIA and notice sub-sections (a), (b) and (f) of 637.7. PC:

- (a) No person or entity in this state shall use an electronic tracking device to determine the location or movement of a person.
- (b) This section shall not apply when the registered owner, lessor, or lessee of a vehicle has consented to the use of the electronic tracking device with respect to that vehicle.
- (c) This section shall not apply to the lawful use of an electronic tracking device by a law enforcement agency.
- (d) As used in this section, "electronic tracking device" means any device attached to a vehicle or other movable thing that reveals its location or movement by the transmission of electronic signals.
- (e) A violation of this section is a misdemeanor.
- (f) A violation of this section by a person, business, firm, company, association, partnership, or corporation licensed under Division 3 (commencing with Section 5000) of the Business and Professions Code shall constitute grounds for revocation of the license issued to that person, business, firm, company, association, partnership, or corporation, pursuant to the provisions that provide for the revocation of the license as set forth in Division 3 (commencing with Section 5000) of the Business and Professions Code.



Paragraph (f) means a Private Investigator could lose his/her license as well as be criminally prosecuted and very likely sued.

AND NOTICE that the law doesn't specify "GPS Trackers". This is not an error. This law also applies to using an app on a smartphone to track the spouse on his/her smartphone. Or any other electronic means.

More and more States are making GPS trackers illegal especially since the publicity surrounding Ashley's Judd's divorce case in which a GPS tracker was used. <http://tasteofcountry.com/wynonna-judd-tracking-device.../>

ANOTHER REASON we don't use them anymore is a tracker will not tell us which building the subject walked to after getting out of the car; or which motel room; or which store at the mall; or they may park in a garage which blocks the signal; or they drive to an area with bad cell service (trackers use cellular services to "call in" their location); or the subject leaves the car with the tracker on it at home and the other subject comes and picks them up in another car.

Continued on page 27 ➔

← Continued from page 26

One client who purchased her own GPS tracker called us and said, "He's been parked in the same spot for two hours! I know he's with her now! I need you to go and... oh wait... the garage door just opened... he just got home... never mind." GPS TRACKERS ARE NOT THAT ACCURATE since they rely on cellular service and clear line-of-sight with a cell tower to work properly. They use GPS to determine their location, and they use cellular to report their location.

THE LESSON: CHOOSE SURVEILLANCE. We physically tail them, EYES ON, VIDEO CAMERAS ON. Our surveillance is covert or subrosa and they never know we're there until we testify in court if needed.

HIRE PROFESSIONALS TO TAIL THEM. DON'T EXPOSE YOUR CLIENT OR YOURSELF TO A CRIMINAL CHARGE OR A LAWSUIT.



DON TRECO is Gumshoe Detective Agency, Inc.'s Owner/Investigator who retired from State law enforcement with twenty years' experience in investigations including surveillance and successful prosecutions, courtroom testimony and more. In over twenty-one years as owner of Gumshoe Detective Agency he has appeared on the Judge Mathis television program in Chicago, consulted in the Natalie Wood death case, consulted for television series, and assisted researchers in the famous Zodiac serial killer case (California).

Introducing the New Educational Silos



Beginning May 1, 2023, LPI will be offering more opportunities for learning as a result of a rebrand. Stay tuned for more information.

Sayler LEGAL SERVICE



ZOOM HOSTING

Depositions
and Trials
Conf. Rooms

E-FILING PORTAL

Live Chat
Concierge
eFiling

SERVICE OF PROCESS

Registered
and Bonded
Process Servers

SUBPOENA NOTICE

Preparation
On-Site Digital
Copying

COURT SERVICES

Research
Record
Retrieval

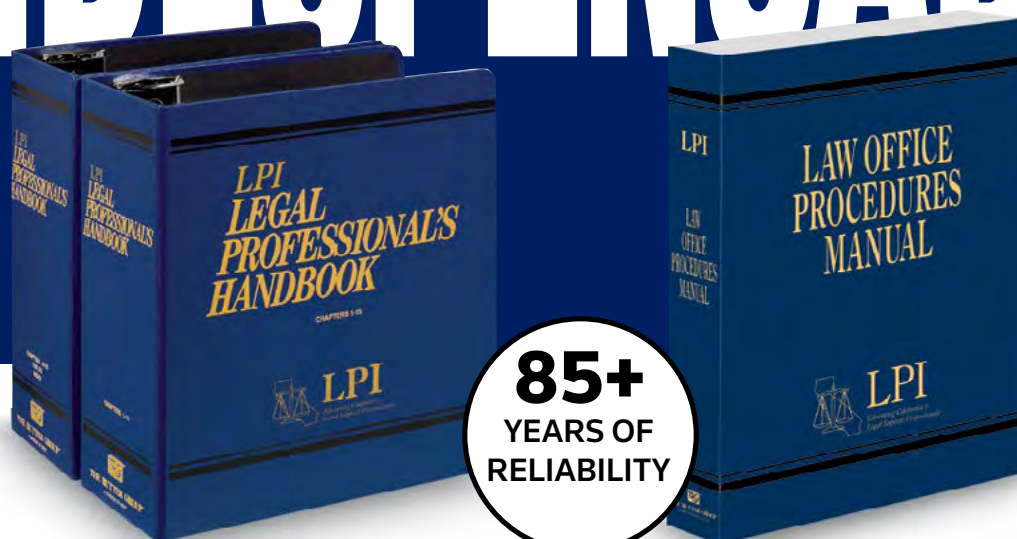
TRIAL SUPPORT

Equipment
Hot Seat
Operator

*California Central Coast
& Beyond*

WWW.SAYLERLEGAL.COM | 831.384.4030 | INFO@SAYLERLEGAL.COM

INDISPENSABLE



LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

Busy lawyers rely on their staff to handle many details of their practice. They look to you, as a professional, to know what to do, and when and how to do it. The **Legal Professional's Handbook** provides you with the answers . . . just as it has for over 85 years! Each chapter contains detailed practice forms and step-by-step instructions covering every major area of California law practice. The Handbook is an invaluable resource to add to your entire reference library!

LPI Members-Only Price\$421.40

Nonmembers Price\$602

Price includes shipping. Add applicable sales tax.

This title is updated annually for subscribers by replacement pages.

LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

This must-have manual and forms guide contains detailed practice forms for major areas of law practice, both civil and criminal, along with step-by-step instructions for completing them. The manual includes Judicial Council forms and California recording laws. The manual also provides procedural checklists, transcriptions and proofreading tips, sample calendar notations, practice tips for filing documents with the court, and a glossary of legal terms.

LPI Members-Only Price\$238.70

Nonmembers Price\$341

Price includes shipping. Add applicable sales tax.

This title is updated twice yearly for subscribers by replacement edition.

Buy both LPI books together and get a discount!

Combo price for both books.....\$660.10

Price includes shipping. Add applicable sales tax.

**LPI
Members,
call for
discount!**

COMPILED BY

LEGAL PROFESSIONALS, INCORPORATED

PUBLISHED BY

TRG THE RUTTER GROUP™

THOMSON REUTERS®

TO ORDER OR FOR MORE INFO, CALL

1-800-747-3161 (Ext. 2)

www.TheRutterGroup.com



Serving the legal community since 1961

Simply login, submit, track, & manage your services using our client portal.

CONTACT US



office:
(800) 675-5376



fax:
(866) 241-0051



email:
orders@directlegal.com

SERVICES

- Process Serving
- Skip Tracing
- Writ Levies
- Court Filing
- E-Filing
- Document Research and Retrieval
- Out of State Foreign Subpoena Service
- Photocopy & Reprographics



Summary (Initial Filing) • Order Number 17935

Court Location:	Orange County - Santa Ana
Case Category:	Civil - Unlawful Eviction - \$25,000
Case Type:	Rule 3.740 Collection
Filing Attorney:	Eric Delacruz
Parties to Case:	Party Type: Party Name: Local Attorney: Defendant: Sally Sample King Plaintiff: Paul Plaintiff Timothy Delacruz
Filing Fee Order:	Filing Code: Reference Number: Description: Completed: 8/22/2015 Fee: \$150

E-FILING

- Fast, Easy, and Reliable
- Certified EFSP
- Customer Support
- Secure 24/7 Access
- Detailed Reporting
- Competitive Pricing

WWW.DIRECTLEGAL.COM

1541 Wilshire Blvd, Suite 550 Los Angeles, CA 90017



California Certified Legal
Secretary
A Program of LPI®



APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LPI Membership Card (if applicable), and fees to:
Brenda Johnson, CCLS, 988 Posey Street, Galt, CA 95632

(Select one)
☐ **Saturday, March 18, 2023**
☐ **Saturday, March 18, 2023**

(Select one)
☐ **Saturday, September 16, 2023**
☐ **Saturday, September 16, 2023**

- **Deadline:** Applications must be received **60 days** prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than **60 days** (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least **30 days** prior to the exam date.

EXAMINATION FEES (Select Payment Type)	Check <input type="checkbox"/> Payable to "LPI" Mail to above address	Stripe <input type="checkbox"/> Email exam application to CCLSCBChair@legalprofessionalsinc.org . Payment link will be provided upon confirmation of eligibility to sit for exam.
LPI Members <input type="checkbox"/>	Non-LPI Members <input type="checkbox"/>	
On Time Registration Fee \$ 25.00	On Time Registration Fee \$ 75.00	
Examination Fee* 100.00	Examination Fee* 100.00	
Late Fee (if applicable) 45.00	Late Fee (if applicable) 45.00	
TOTAL DUE w/o Late Fee: \$125.00	TOTAL DUE w/o Late Fee: \$175.00	

Personal Information

Name: _____

Mailing Address: _____

Last 4 digits of SSN: _____ Email: _____

Phone (Day): _____ Phone (Evening): _____

LPI Member: ☐ Yes (enclose copy of LPI Membership Card) ☐ No

Name of Local LPI Association: _____

Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

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 not to be discussed with anyone, and that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Date: _____

Applicant Signature _____

*Fees subject to change without notice.

Rev. December 2022

E-Filing & E-Recording Easy Breezy.



Ready to save time, trees, and money by using e-filing and e-recording services? The CPS e-filing portal is user friendly, cost efficient, and accepted at California mandated e-filing courts. As a family-owned company, our local team of experts are here to help you every step of the way. Now that's easy.



Your Complete Legal Service Solution Since 1993

Process Serving | E-Recording | E-Filing | Court Filing | Skip Tracing
On-Site/Off-Site Scanning | Subpoena Preparation | Depo Officer | Messenger Services

comproserve.net | 805.650.9291



LPI IS ACCEPTING SCHOLARSHIP APPLICATIONS FOR THE 2023-2024 SCHOLARSHIP YEAR

LPI WILL BE AWARDING UP TO SIX SCHOLARSHIPS RANGING FROM \$1,000 - \$2,000 TO PERSONS DESIRING A CAREER IN THE LEGAL FIELD. *

LPI Active Members, LPI Student Members, LPI Associate Members and LPI Members-at-Large shall be eligible for LPI scholarships as long as they meet the criteria as set forth in the Eula Mae Jett Scholarship Program Plan of Administration.

An applicant must (i) be a legal U.S. resident, (ii) be a legal California resident, (iii) live in California during the scholarship year, and (iv) be enrolled in a school or online approved program of no less than six months in duration during the scholarship year.

* A career in the “legal field” includes (i) legal secretary; (ii) legal assistant (including paralegal); (iii) court reporter; and (iv) law office administrator.
Scholarships are not intended for students planning to enter law school.

APPLICATIONS MUST BE POSTMARKED BY APRIL 1, 2023.

For more information,
visit our scholarship page at www.legalprofessionalsinc.org/scholarships

ELECTED OFFICERS

PRESIDENT

ROD CARDINALE, JR.

E-mail: president@legalprofessionalsinc.org

VICE PRESIDENT

DONNA DAY

E-mail: vicepresident@legalprofessionalsinc.org

EXECUTIVE SECRETARY

BETTINA JACOBSON

E-mail: executivesecretary@legalprofessionalsinc.org

TREASURER

RITA BURNETT, CCLS

E-mail: treasurer@legalprofessionalsinc.org

APPOINTED OFFICERS

EXECUTIVE ADVISOR (NOMINATIONS AND ELECTIONS CHAIR)

LYNNE PRESCOTT, CCLS

E-mail: executiveadvisor@legalprofessionalsinc.org

PARLIAMENTARIAN

ELISE DRESSER, CCLS

E-mail: parliamentarian@legalprofessionalsinc.org

EDITOR-IN-CHIEF, PUBLICATIONS REVISION COMMITTEE (CEC)

LINDA LANE, CCLS

E-mail: editorinchief@legalprofessionalsinc.org

EDITOR, THE LEGAL PROFESSIONAL (Marketing)

BARBARA BARREGAR

E-mail: TLPEditor@legalprofessionalsinc.org

EDUCATIONAL PROGRAM COORDINATOR (CEC/Marketing)

RENEE EVANS, CCLS

E-mail: cec@legalprofessionalsinc.org

HISTORIAN

SHANNON QUIGLEY

E-mail: historian@legalprofessionalsinc.org

LEGAL SPECIALIZATION SECTIONS COORDINATOR (CEC/Marketing)

MARY LOU FLOYD, CCLS

E-mail: lss@legalprofessionalsinc.org

CHAIRMEN

ADVERTISING (Marketing)

HEATHER NOWAK

E-mail: advertising@legalprofessionalsinc.org

CALIFORNIA CERTIFIED LEGAL SECRETARY (CEC/Marketing)

VIVIAN SHREVE, CCLS

E-mail: cclschair@legalprofessionalsinc.org

SOUTHERN CALIFORNIA CAREER PROMOTION/PROFESSIONAL

LIAISON (Marketing)

ERIKA GARDUÑO

E-mail: careerpromotions@legalprofessionalsinc.org

NORTHERN CALIFORNIA CAREER PROMOTION/

PROFESSIONAL LIAISON (Marketing)

LEANNE RUESINK

E-Mail: nccareerpromotions@legalprofessionalsinc.org

EDITOR, THE LEGAL PROFESSIONAL'S HANDBOOK (PRC)

LISA DE LA O

E-mail: lpbeditor@legalprofessionalsinc.org

EDITOR, LAW OFFICE PROCEDURES MANUAL (PRC)

ELIZABETH ADAME, CCLS

E-mail: lopmeditor@legalprofessionalsinc.org

LEGAL PROCEDURES/BLOG EDITOR (CEC/Marketing)

LARRY McGREW

E-mail: legalprocedure@legalprofessionalsinc.org

LEGAL PROFESSIONAL TRAINING/SEMINARS (CEC/Marketing)

CYNDEE SAUCEDA, CCLS

E-mail: lpchair@legalprofessionalsinc.org

SCHOLARSHIP (Marketing)

CHERON MCALEECE, CCLS

E-mail: scholarship@legalprofessionalsinc.org

SOCIAL MEDIA (Marketing)

RON ACKLAND

E-mail: socialmedia@legalprofessionalsinc.org

LIAISON TO THE LAW PRACTICE MANAGEMENT AND TECHNOLOGY SECTION OF THE CALIFORNIA LAWYERS ASSOCIATION (Marketing)

BROOKE MANSFIELD

E-mail: lpmtliaison@legalprofessionalsinc.org

CO-LEGACY PROJECT CURATOR

MARY ROCCA, CCLS

E-mail: legacy.project@legalprofessionalsinc.org

CO-LEGACY PROJECT CURATOR

HEATHER EDWARDS, CCLS

E-Mail: co-legacycurator@legalprofessionalsinc.org

TECH CHAIR (Marketing)

DAWN R. FORGEUR, CCLS

E-mail: techchair@legalprofessionalsinc.org

WEBINAR TEAM

WEBINAR TEAM CHAIR (Marketing)

JANICE WILLIAMS

E-mail: lpwebinarchair@legalprofessionalsinc.org

WEBINAR TEAM ASSISTANT

FRANCES SKAGGS, CCLS

E-mail: lpwebinarasst1@legalprofessionalsinc.org

WEBINAR TEAM ASSISTANT

RACHEL MALERBI

E-mail: lpwebinarasst2@legalprofessionalsinc.org

LEGAL SPECIALIZATION SECTIONS

COORDINATOR (CEC/Marketing)

MARY LOU FLOYD, CCLS

E-mail: lss@legalprofessionalsinc.org

CIVIL LITIGATION

SUSAN HUSHER

E-mail: civil.litigation@legalprofessionalsinc.org

CRIMINAL/FAMILY LAW

CAROLINA RAMOS, CCLS

E-mail: criminal.family.law@legalprofessionalsinc.org

FEDERAL LAW

LAURA PUMERVILLE, CCLS

E-mail: federal.law@legalprofessionalsinc.org

LAW OFFICE ADMINISTRATION

MARIA GONZALEZ, CCLS

E-mail: law.office.administration@legalprofessionalsinc.org

PROBATE/ESTATE PLANNING

CARMEN VASQUES

E-mail: probate.estateplanning@legalprofessionalsinc.org

SPECIALTY LAW

BELINDA OWENS

E-mail: specialty@legalprofessionalsinc.org

PUBLICATIONS REVISION COMMITTEE

EDITOR-IN-CHIEF (CEC)

LINDA LANE, CCLS

E-mail: editorinchief@legalprofessionalsinc.org

EDITOR, THE LEGAL PROFESSIONAL'S HANDBOOK (PRC)

LISA DE LA O

E-mail: lpheeditor@legalprofessionalsinc.org

EDITOR, LAW OFFICE PROCEDURES MANUAL (PRC)

ELIZABETH ADAME, CCLS

E-mail: lopmeditor@legalprofessionalsinc.org

ASSISTANT EDITOR

LIDIA GANDEVIA

E-mail: prcassted3@legalprofessionalsinc.org

ASSISTANT EDITOR

NORMA MARQUEZ

E-mail: prcassted2@legalprofessionalsinc.org

ASSISTANT EDITOR

TANYA TATE

E-mail: prcassted5@legalprofessionalsinc.org

ASSISTANT EDITOR

CHERYL KENT, PLS, CCLS

E-mail: prcassted4@legalprofessionalsinc.org

ASSISTANT EDITOR

JENNIFER PAGE, CCLS

E-mail: prcassted1@legalprofessionalsinc.org

CCLS CERTIFYING BOARD

MEMBER (CHAIR)

BRENDA JOHNSON, CCLS

E-mail: ccls.cbchair@legalprofessionalsinc.org

MEMBER

MARIA BISHOP, CCLS

E-mail: ccls.cbm3@legalprofessionalsinc.org

MEMBER

SALLY BUTTERWORTH, CCLS

E-mail: ccls.cbm4@legalprofessionalsinc.org

MEMBER

LINDA GUBBA-REINER, CCLS

E-mail: ccls.cbm1@legalprofessionalsinc.org

MEMBER

AMY MANN, CCLS

E-mail: ccls.cbm2@legalprofessionalsinc.org

ATTORNEY MEMBER

NICHOLAS BRUMMEL, ESQ.

E-mail: nbrummel@hbblaw.com

ATTORNEY MEMBER

ELAINE TORRES, ESQ.

E-mail: etorres@walterclark.com

CORPORATE OFFICE

ADMINISTRATOR

KIM ORENO

E-mail: kim@legalprofessionalsinc.org

CONTINUING EDUCATION COUNSEL (CEC)

EDUCATIONAL PROGRAM COORDINATOR

RENEE EVANS, CCLS

EDITOR IN CHIEF

LINDA LANE, CCLS

CALIFORNIA CERTIFIED LEGAL SECRETARY

VIVIAN SHREVE, CCLS

LEGAL PROCEDURE/BLOG EDITOR

LARRY McGREW

LEGAL PROFESSIONAL TRAINING/SEMINARS

CYNDEE SAUCEDA, CCLS

LEGAL SPECIALIZATION SECTIONS LEADER

MARY LOU FLOYD, CCLS

MARKETING COMMITTEE

COORDINATOR/EC LIAISON

DONNA DAY

ADVERTISING

HEATHER NOWAK

CALIFORNIA CERTIFIED LEGAL SECRETARY

VIVIAN SHREVE, CCLS

CCLS CERTIFYING BOARD, CHAIR

BRENDA JOHNSON, CCLS

EDITOR, THE LEGAL PROFESSIONAL

BARBARA BARREGAR

EDUCATIONAL PROGRAM COORDINATOR

RENEE EVANS, CCLS

LEGAL PROCEDURE/BLOG EDITOR

LARRY McGREW

LEGAL PROFESSIONAL TRAINING/SEMINARS

CYNDEE SAUCEDA, CCLS

LEGAL SPECIALIZATION SECTIONS LEADER

MARY LOU FLOYD, CCLS

LIAISON TO THE LAW PRACTICE MANAGEMENT AND TECHNOLOGY

SECTION OF THE CALIFORNIA LAWYERS ASSOCIATION

BROOKE MANSFIELD

SCHOLARSHIP

CHERON MCALEECE, CCLS

SOCIAL MEDIA

RON ACKLAND

SOUTHERN CALIFORNIA CAREER PROMOTION/

PROFESSIONAL LIAISON

ERIKA GARDUÑO

NORTHERN CALIFORNIA CAREER PROMOTION/

PROFESSIONAL LIAISON

LEANNE RUESINK

TECH CHAIR

DAWN FORGEUR, CCLS

WEBINAR TEAM CHAIR

JANICE WILLIAMS, CCLS

LPI WEBSITE

www.legalprofessionalsinc.org



LPI

BENEFITS

NOTE: This list is maintained for use by members of Legal Professionals Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. For information, call these representatives directly. For questions and concerns regarding Member Benefits, please contact the LPI Vice President at vicepresident@legalprofessionalsinc.org.

LEGALSHIELD/IDSHIELD

Contact: Courtney Coats, Independent Associate
(925)580-6446 | coats8@legalshieldassociate.com
LegalShield offers legal, identity theft protection, along with a massive Perks Program with significant savings to over 500 local and national companies.

WORKING ADVANTAGE

Toll Free: (800) 565-3712 | www.workingadvantage.com
Discounts on events, movies, theme parks, live theater, sporting events, ski tickets, hotels, family events, gift cards and more.
Member ID: Contact LPI Corporate Office at info@legalprofessionalsinc.org

HERTZ CORPORATION

Effective Date: June 1, 1996
CDP Card #447698
(800)654-3131 | www.hertz.com

NORTHWESTERN MUTUAL Charles Hamilton

515 South Flower Street, 34th Floor
Los Angeles, CA 90071
(213) 243-7033 | www.charleshamilton.nm.com
charles.hamilton@nm.com
Comprehensive Financial Planning and Wealth Management

EMPLOYEE AND MEMBER DISCOUNTS

<https://www.employeeandmemberdiscounts.com/employee-discounts-and-offers/legal-professionals-incorporated/>
Discounts on auto and car, entertainment, financial, health and medical, home services, insurance and warranty services, travel and vacation, pet care, and other unique offers.

PROVIDENT CREDIT UNION

303 Twin Dolphin Drive
P.O. Box 8007 Redwood City, CA 94603-0907
(800) 632-4699 | (650) 508-0300
www.providentcu.org | All LPI members are eligible to join.

LA FINANCIAL FEDERAL CREDIT UNION

P.O. Box 6015
Pasadena, CA 91102-6015
(800) 894-1200 | www.lafinancial.org
Open to anyone working or living in L.A. County, or referrals from existing member.

CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL

5000 E. Spring Street, Suite 200
Long Beach, CA 90815
Office: (562) 420-9009 or (877) 270-9342
Fax: (562) 420-9955 | www.ciadvisers.com
Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, Comprehensive Financial Planning



FIRST LEGAL



LITIGATION SUPPORT YOU CAN TRUST!

ABOUT US

First Legal is the first comprehensive File Thru Trial™ solutions firm. For over 30 years, we have offered a streamlined experience with fast turnaround.

Our six divisions work together to tackle every assignment with precision and excellence.



FILE THRU TRIAL™

First Legal simplifies the litigation process from File Thru Trial™.

From the beginning to end of the litigation process, or at any point in between, we are here for you.

Our broad range of services help simplify your workload.



COURT & PROCESS

Court Filings
eFiling
eRecording

DEPOSITIONS

Court Reporting
Deposition & Case Management
Videographers

DISCOVERY

Early Case Assessment & Consultation
Preservation & Litigation Holds
Data Collection

RECORDS

Subpoena and Authorization Services
Subpoena Preparation
Deposition Officer Designation

DIGITAL

Litigation Copying & Scanning
Exhibit Boards & Binders
Mail-Outs

INVESTIGATIONS

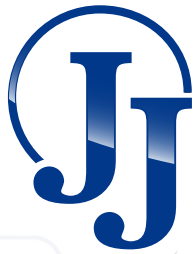
Surveillance & Sub Rosa
Background Searches
Skip Tracing

Get in touch

| 800.889.0111

| www.firstlegal.com

| info@firstlegal.com



JANNEY & JANNEY
LEGAL SUPPORT SERVICE

NEW

JANNEY portal



REGISTER YOUR NEW
ACCOUNT NOW AT

janneyandjanney.com

[Portal features and functionality include]

- Electronic Filing and Electronic Service capable
- A "Route Pick-Up" delivery option for our Retainer Clients with a daily pick-up.
- User-friendly web interface tested by legal professionals and court approved.
- Securely create accounts and add users 24/7 using a completely paper-less process.
- Easily place orders and maintain a complete record of your cases & documents.
- View and share status communication updates with colleagues and clients.

Let us add you to the growing list of clients who are using the portal to make their jobs easier.

"I am LOVING the new system! Seriously...very user friendly."

- Alison (Orange County Client)

"Just wanted you to know that I've now used the new portal for two filings and am VERY happy with it. Super easy to use."

- Darla (Los Angeles Client)

"I really like being able to see all cases in one location. It is really easy to use."

- Miguel (Orange County Client)



Los Angeles

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

Orange County

840 N. Birch Street
Santa Ana, CA 92701
(714) 953-9451

Inland Empire

455 W. La Cadena Ste. 17
Riverside, CA 92501
(951) 369-8369

Ventura

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