

# The LEGAL PROFESSIONAL<sup>®</sup>

NOVEMBER 2021



## LPI'S 2ND QUARTERLY CONFERENCE BOARD OF GOVERNORS MEETING

NOVEMBER 19-21, 2021

TOWN & COUNTRY RESORT  
SAN DIEGO, CA



WAITING ON COVER

## LPI'S "PASSPORT TO EDUCATION" TRANSATLANTIC JOURNEY CONTINUES TO THE UNITED KINGDOM!

By LPI Executive Committee  
PAGE 13



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### LPI CODE OF ETHICS

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

*Dedicated to LSI 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 works at the office of Messing Adam & Jasmine in Sacramento. 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

### "Building Resilience"

BY LYNNE PRESCOTT, CCLS

In 2015, Sheryl Sandberg, Chief Operating Officer at Facebook, seemed to have it all. She was an influential voice for women in corporate America, best-selling author of "Lean In," and had a happy, supportive family. Then her husband, Dave Goldberg, CEO of Survey Monkey, passed away suddenly while on vacation. She started chronicling her grief and struggles to resume life after loss, which she turned into a book called "Option B: Facing Adversity, Building Resilience, and Finding Joy." "I'm still getting through this," she says, but she's also sharing what she's learned.

She describes what we all go through in times of loss and struggle, and I was particularly struck by her thoughts on resiliency. Her words ring true, especially in this time where nothing is certain, we've all had to draw on our own well of resiliency, and what we know seems to change on a daily basis. Nowhere has this been more challenging than the workplace.

"I've long believed that we have to take our whole selves to work. **Because it's just not the case that we're professional people during the day and emotional people at night and on weekends.** Then when I lost my husband suddenly, I had no choice but to take myself to work – but I couldn't get through a meeting in the very early days without tearing up." She goes on to say how grateful she is for her boss, Mark Zuckerberg, because he not only gave her the time off she needed (something she believes is really important for businesses to do), he built her back up. "When I thought I couldn't do my job, he was the one who said, 'No, I think you made a good point in that meeting.'" She said, "He helped me by both acknowledging my pain and telling me he still believed in me."

So many of our colleagues and LPI family have faced hard things. When we are there for one another – and not pretending that hard things aren't happening but acknowledging them and supporting one another – we build better communities, better workplaces, and better support systems where we can be our authentic selves. We need each other.

Sheryl says, "What I've learned is that we don't have a fixed amount of resilience. **Resilience is like a muscle we build**, but we don't only build it in ourselves. We build it in one another by acknowledging their pain, what they are going through, and being there for each other."

One of the best things about being part of the LPI family is that we ARE there for each other. We have not only endured personal loss and struggles over the past 18 months, but our associations have also endured loss and struggle. I have been so impressed with how you have all been there for each other, holding each other up. You have banded together and supported each other in ways never before seen in this organization's history.

Our membership numbers reflect the loss and the struggle of so many of our associations. But those numbers do not reflect the resiliency of our members. I am enormously proud of you and proud to be your president during this moment in our history. Let's keep building that muscle of resilience, keep moving, keep climbing, and keep the faith. It's all about the climb!

Warmly,





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## Dates to Remember | 2021-2022

**NOVEMBER 12, 2021 | 12:00 P.M. – 1:00 P.M.**

**LPI Webinar** – Filing an Ex Parte Application

**NOVEMBER 18, 2021 | 12:00 P.M. – 1:00 P.M.**

**LSS Webinar** – Insurance Fraud: A Billion Dollar Business

**NOVEMBER 19-21, 2021**

**LPI's Second Quarterly Conference**

"Passport to Education"

Town & Country Resort, San Diego, CA

Co-Hosted by LPI and San Diego LSA

**DECEMBER 2, 2021 | 12:00 P.M. – 1:00 P.M.**

**Investing Basics** – Five Steps to Building a Disciplined Investment Strategy

**DECEMBER 6, 2021 | 6:30 P.M.**

**Eye on LPI** – Holiday Edition

(Free ZOOM Event - You must register in advance!)

**DECEMBER 10, 2021 | 12:00 P.M. – 1:00 P.M.**

**LPI Webinar** – Notice of Appeal: What Should Be On Your Checklist

**JANUARY 13, 2022 | 12:00 P.M. – 1:00 P.M.**

**LSS Webinar** - Emojis and E-Discovery: How to Mitigate Risky Business!



California Certified Legal  
Secretary  
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## APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LPI Membership Card (if applicable), and fees to:  
**Vivian L. Shreve, CCLS, c/o WSGR, 650 Page Mill Road, Palo Alto, CA 94304**

(Select one)

☐ **Saturday, March 19, 2022**

☐ **Saturday, September 17, 2022**

- **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.

<b>EXAMINATION FEES</b> (Select Payment Type)		<b>Check</b> <input type="checkbox"/> Payable to "LPI" Mail to above address	<b>PayPal</b> <input type="checkbox"/> Email exam application to <a href="mailto:CCLSCertifyingBoard@gmail.com">CCLSCertifyingBoard@gmail.com</a> . Payment link will be provided upon confirmation of eligibility to sit for exam.
<b><u>LPI Members</u></b> <input type="checkbox"/>		<b><u>Non-LPI Members</u></b> <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
<b>TOTAL DUE w/o Late Fee:</b>	<b>\$125.00</b>	<b>TOTAL DUE w/o Late Fee:</b>	<b>\$175.00</b>

### Personal Information

Name: _____	
Mailing Address: _____	
Last 4 digits of SSN: _____	Email: _____
Phone (Day): _____	Phone (Evening): _____
LPI Member: <input type="checkbox"/> Yes (enclose copy of LPI Membership Card) <input type="checkbox"/> 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.



# HAVE YOU THOUGHT ABOUT BECOMING A CA CERTIFIED LEGAL SECRETARY (“CCLS”)?

BY RITA BURNETT, CCLS – SUBMITTED BY LOS ANGELES LSA

Have you been thinking about becoming a California Certified Legal Secretary (“CCLS”)? There are many benefits to becoming a CCLS, such as qualifying for professional, personal, and economical rewards. You will improve your knowledge of California legal practice and procedures. You will broaden your opportunities for job advancement. You will enhance your self-confidence and self-esteem. You will also gain recognition and respect within the legal community. Becoming a CCLS is a great feeling of accomplishment. We encourage you to broaden your horizons and take it a step further in your career. Here are a few things you should know about becoming a CCLS:

## Taking the CCLS Exam

- **Who is eligible to take the exam?**  
Any person, who has a minimum of two (2) years’ full-time experience as a legal secretary, or equivalent as approved by the Certifying Board, may apply to take the examination.  
Note: Membership in Legal Professionals, Incorporated, is not a requirement to sit for the examination.
- **When is the exam?**  
The examination is given in March and September each year on a date to be determined by the CCLS Certifying Board, generally on the third Saturday of the month.
- **Is there a deadline to submit my application?**  
Completed applications must be received by the CCLS Certifying Board sixty (60) days prior to the examination date.
- **What does the exam cover?**  
The exam will cover the following areas:
  - Ability to Communicate Effectively
  - California Legal Procedures
  - Skills
  - Legal Computations
  - Legal Terminology
  - Law Office Administration
  - Reasoning and Ethics
- **What are the fees?**

	LPI Member	NON-LPI Member
Reg. fee:	\$25	\$75
Exam fee:	\$100	\$100
Total App. fee:	\$125	\$175

- **How is the exam scored?**  
A candidate may pass the examination in two ways: (i) if the overall score (the combined score for all seven (7) sections) is seventy-five percent (75%) or better, or (ii) if each individual section is passed with a score of seventy percent (70%) or better (retakes allowed if four (4) or more sections passed at one sitting).
- **How soon will I receive my results?**  
The examination will be graded within six (6) weeks of the test date and the results electronically mailed to the candidates.

## Preparing to Take the CCLS Exam

If you prefer studying in a group as you prepare to take the CCLS Exam, you might consider joining LPI’s CCLS On-Line Study Group. The Study Group meets virtually for 10 weeks before each exam in March and September. The Study Group is setup for you to work at your own pace and at your convenience. If you have any questions about the Study Group, contact Rita Burnett, CCLS, at [cclschair@legalprofessionalsinc.org](mailto:cclschair@legalprofessionalsinc.org). You may also visit LPI’s website at [www.lpi.org](http://www.lpi.org) for further information.

STRIVE FOR SUCCESS  
BE A CCLS!



**RITA BURNETT, CCLS** has been serving as President of the Los Angeles Legal Secretaries Association since 2016 and is also serving as Governor Pro Tem. She is the recently appointed LPI CCLS Chair. She has worked as a legal secretary since 1989. She obtained her Paralegal Certificate from West Los Angeles College in 1992. She currently works for Barbanell & Treuer, P.C. in Century City. She resides in Inglewood, California with her 20-year-old son Marcellus, her adopted cat “Dot” and her adopted Pitbull mix named “Kayce.”



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LPI Member/Local Association Member - \$25 and Under  
Non-LPI Member or Attorney - \$50 and Under

Check out all of the Webinars on Demand on our website:  
<https://www.legalprofessionalsinc.org/recorded-webinars-for-sale/> or scan the QR below.





# LPI'S WEBINARS ON DEMAND

## An Awesome Resource for Local Associations!

BY KRISTI L. EDWARDS, CCLS – SUBMITTED BY MARIN COUNTY LPA

Marin County Legal Professionals Association just concluded its first meeting using a recorded webinar from the LPI Webinars on Demand library. What an awesome resource for local associations!

We have been holding membership meetings via Zoom for some time now. We are a small association, but have regular attendance from a core group. Still, it's difficult for us to ask a speaker to prepare a lecture and give up their time, knowing that we may have just a tiny audience. Because we are no longer meeting at restaurants, we can't even offer them dinner like we used to do!

We decided to try the recorded webinar route. Our board looked at the topics available and chose a timely one we thought would interest most of our members. A flyer and handout came with the presentation! All we had to do was insert the pertinent information for our association, the date, time, and contact information. The flyer was then sent back to LPI and it was posted on the LPI website. We, of course, also circulated the flyer among our membership and included information about the meeting in our newsletter.

A link to a Zoom meeting, including the handout, was sent to everyone who responded to the flyer. One member accessed the webinar through the link provided by LPI and during the Zoom meeting, shared her screen. At that was it! – we were all connected and watching the webinar. Easy, peasy!

We planned a discussion period after the webinar, attended to a bit of association business, and the meeting was done. Seven people earned MCLE and/or CCLS credits, including one person who was not a member of Marin County LPA, but a CCLS from Merced who was

seeking CCLS credits for her renewal next month. She found the webinar notice on the LPI website and joined us for the meeting. How awesome is that?

### **We do have a few suggestions if you are going to try this:**

1. Definitely do a technology check before your meeting. At first, we had an audio issue, but it was resolved before the meeting.
2. The person sharing their screen obviously has to keep their mic open, so realize that background noise at that site could be overheard.
3. Try to anticipate outages – unbeknownst to the person sharing her screen, the computers at her worksite automatically turned off at a scheduled time – five minutes after the webinar started! She was quickly able to restart and we picked up the webinar exactly where it left off, but it did cause a brief panic.
4. Expect that there may be technological challenges, but stay calm and work through it. We are all becoming more accustomed to the webinar technology, but everyone knows that stuff happens. Just roll with it.

All in all, it was a good experience and we are very grateful to LPI for providing this access to their webinar library. We encourage you to take advantage of this tremendous resource. We plan to do it again soon!



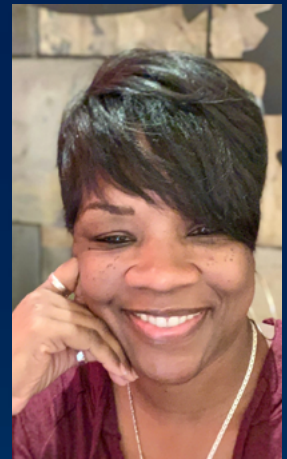
**KRISTI L. EDWARDS, CCLS,**

is an active and honorary member of Marin County LPA who is a legal assistant and office manager at Froneberger & Leviloff in San Rafael, an estate law firm specializing in estate planning, estate administration, and probate litigation.

JOIN THE CAST OF

***EYE on LPI***

Erika & Marci



HOLIDAY EDITION

MONDAY, DEC. 6, 2021 @ 6:30 P.M.



A *FREE* Zoom  
Event with lots of  
giveaways!

Must register in advance.





# MOVING YOUR ASSOCIATION FORWARD

## Climb that LPI Mountain!

BY HEATHER EDWARDS, NOMINATIONS AND ELECTIONS CHAIR

Can you believe that the time has come once again for members of LPI to begin thinking about the future leadership of this corporation? Yes, the time for the election of officers is just around the corner in May 2022. Soon local association nominations and elections committees will begin asking members to step up or “Elevate” and run for office, or volunteer to be a committee chair.

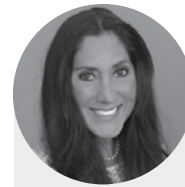
Take this time now, to consider what you would have liked your association to have offered over the past year. This has been an unprecedented 20+ months as we have navigated through the global pandemic. Has your association been holding virtual meetings? If so, have you amended your association bylaws so you are able to hold meetings via electronic means? Are you back holding socially distanced in-person meetings? Have you utilized the LPI webinar library and provided educational webinars to your members? Are you promoting your association on social media by FLITY (Facebook; LinkedIn; Instagram; Twitter; and YouTube)? Consider what you and your team CAN do for your association this fiscal year and, more importantly, what can you do for LPI. If you think, “Someone else will handle it,” or “Now is not the time for me to get involved,” or “I just don’t have the time,” then nothing will ever happen. Complacency is not an option.

If you want something to happen, you have to take the steps to make it happen. It is never a “safe move” when you step outside of your comfort zone, but amazing things happen when you do. It is time to “Elevate” yourself personally and professionally. Make the decision to run for an office of your local association or volunteer to be a committee chair. How about living dangerously and decide right now that you would like to

run for an LPI elected office or chair an LPI committee on the state level? What is holding you back? LPI and the local associations are always looking for new leadership, knowledge, and fresh ideas. Your associations will never benefit from the wealth of expertise and fresh ideas that each member has to offer unless members step up and serve in some capacity. We need you to climb that proverbial “LPI Mountain” and we need you NOW!

These changing vulnerable times demand a commitment by those in the legal field to achieve the highest degree of excellence in every phase of personal and professional growth. We must commit to the highest degree of excellence in every phase of our personal and professional growth if we want to see LPI prosper and grow. Be a part of that growth, and take that first step to Elevate. It is all about the climb as President Lynne’s theme states. You will not be alone in this venture, because there are many members with the history, knowledge, and experience to help you along the way. Take advantage of these mentors because they hold the legacy and history of your association. These longtime members, association Past Presidents, LSI Past Presidents, Executive Committee Members, and LPI appointed chairs can provide invaluable information to help you succeed as an officer or a chairman.

I encourage you to take that first step outside of your comfort zone and make the decision to run for office. It takes a certain level of commitment, professionalism, and desire to make a difference in this corporation. The future of LPI depends on its members and quality leadership of its officers and chairmen. The future of LPI needs YOU!



**HEATHER EDWARDS**

is LPI's current Executive Advisor,

Nominations and Elections Chair and the Legacy Project Curator and is a member of San Fernando Valley Legal Secretaries Association since 1991, the same year she joined the legal field. She obtained her Bachelor's Degree from California State University Northridge. In May 2006, LSI President Mary S. Rocca presented Heather with the President's Award. Heather resides in Northridge, California with her husband Ernie, and their 4 children, Kennedy, Koree, Kaden and Kamden.

AUGUST 27-29, 2021 | SANTA CLARA, CA

# LPI'S FIRST QUARTERLY CONFERENCE BOARD OF GOVERNORS MEETING





We embarked on the “S.S. LPI” for an educational and cultural “cruise” where our destination was the Mexican Riviera at LPI’s First Quarterly Conference Board of Governors Meeting which was held at the Santa Clara Marriott on August 27-29, 2021. Santa Clara County LPA were amazing hosts! It was so good to see the smiling faces of the exhibitors and all LPI members in attendance. It was also great to conduct business of the corporation in person. The Continuing Education Council educational presentation on Saturday afternoon was very informative with Ronald Peters from Littler Mendelson who spoke about “The Good, The Bad and The Ugly! Working From Home and From the Office: Strategies for Employers and Employee Rights.” The weekend adventure ended at Brunch with an emotional yet very inspiring personal story from Erika Garduño.





**LEGAL  
SPECIALIZATION  
SECTIONS**

**November 20, 2021**

**LPI Quarterly Conference, San Diego, CA**

**Deadline to register without late fee: November 5<sup>th</sup>**

Section Member(s): Free | All others: \$25

Handout only: \$5

**11:00 A.M. – 12:00 P.M. SEMINARS**

**CIVIL LITIGATION:**

**100 DAYS TO TRIAL**

STEVEN RIZNYK, ESQ. (SAN DIEGO BIZ LAW, APC)

**SPECIALTY LAW:**

**CORPORATE LAW & SIDE HUSTLES**

JAMES ROTH, ESQ. (THE ROTH LAW FIRM)

**3:00 P.M. – 4:00 P.M. SEMINARS**

**FAMILY LAW:**

**COVID SHOTS: NOT MY KID VS. YES, MY KID**

NAGHMEH BASHAR, ESQ., CFLS AND SARA YUNUS, ESQ., CFLS (ANTONYANMIRANDA)

**FEDERAL LAW:**

**IMMIGRATION ISSUES NOW**

ANNE BAUTISTA, LEGAL SUPPORT & STRATEGY DIRECTOR  
CASA CORNELIA LAW CENTER

**4:30 P.M. – 5:30 P.M. SEMINARS**

**LAW OFFICE ADMINISTRATION:**

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**ESTATE PLANNING**

PATRICK J. HAASE, ESQ. (SELTZER, CAPLAN, McMAHON, VITEK)



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*The Legal Specialization Sections are a program of Legal Professionals, Inc., an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1 hour each, by the State Bar of California unless otherwise specified. Note: No cash will be accepted at the seminar (credit card and checks only).*



## LPI's "Passport to Education" Transatlantic Journey Continues to The United Kingdom!

Are you ready to continue LPI's Passport to Education Cruise aboard the S.S. LPI? Our headquarters for this leg of the journey will be the beautiful, newly renovated Town & Country Resort in San Diego. Join us as LPI and San Diego LSA co-host the Second Quarterly Conference, in conjunction with the celebration of San Diego LSA's 90th Anniversary, from November 19-21, 2021.

The "S.S. LPI" embarked on its maiden voyage August 27-29, 2021, in Santa Clara, California, for a year-long Transatlantic educational and cultural "cruise." Members were able to get the first stamp on their passport during the First Quarterly Conference at the Santa Clara Marriott, where our destination was the Mexican Riviera. Santa Clara County LPA did an incredible job of launching us on this journey, even working with our Marketing Committee to create a commemorative t-shirt listing all four destinations. It's not too late to get your commemorative shirt – just go to the LPI Store on our website.

Our transatlantic cruise is making its next stop in the historic United Kingdom. The festivities begin Friday evening at the Vendors' Welcome Reception, where the theme will be a "Dickens Holiday." Come visit with the best vendors in town, have a bit of supper, and stick around for prizes and a rousing game of "Name That Tune!"

The Legal Specialization Section seminars are back! Six different educational opportunities await you on Saturday. The Civil Litigation Section presents "100 Days to Trial" and the Specialty Law Section presents "Corporate Law and Side Hustles" in the morning. Saturday afternoon offers

four more seminars: "COVID Shots: Not My Kid vs. Yes, My Kid" by the Family Law Section; "Immigration Issues Now" by the Federal Law Section; "California eFiling Landscape" by the Law Office Administration Section; and "Estate Planning" by the Probate/Estate Planning Section. Talk about getting your educational passport stamped!

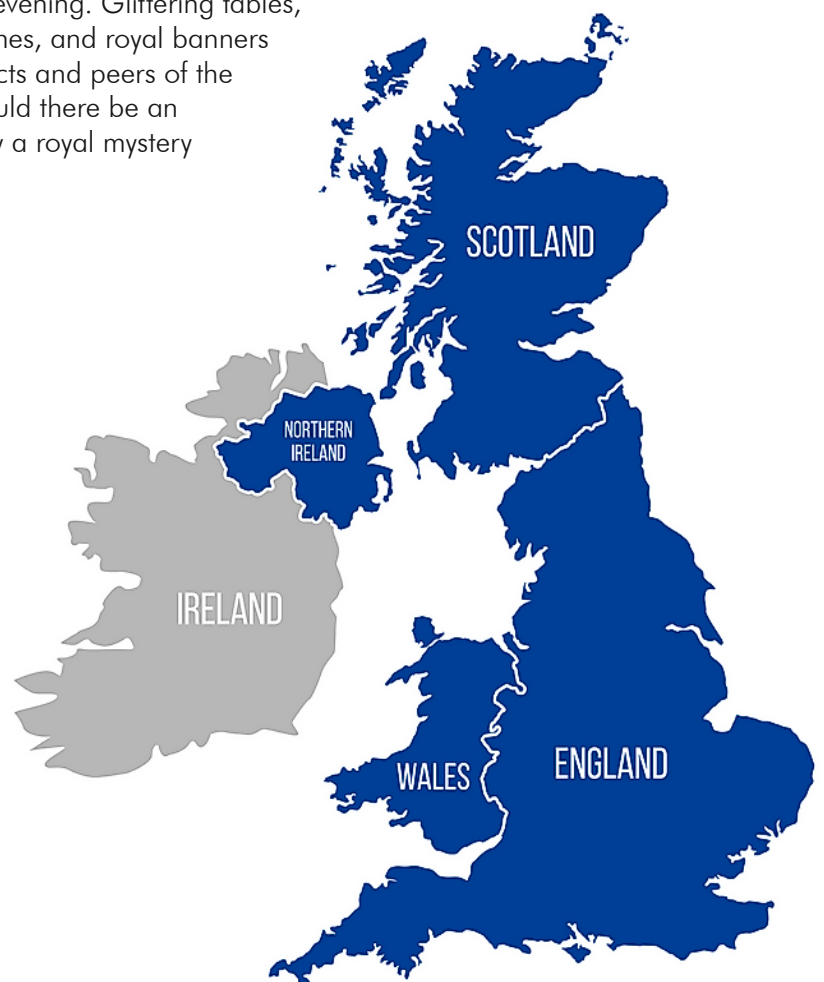
Saturday's luncheons will take us to bonny Scotland. Tartan plaids, Scottish flags, and Scottie dogs are all welcome. What clan are ye from laddies and lassies?

We'll cross the border back into England Saturday evening for a command performance "Royal Banquet." Wear your most stunning evening attire, prized jewels, tiaras and sashes, and prepare yourself for an unforgettable evening. Glittering tables, sumptuous dishes, and royal banners await all subjects and peers of the realm. And could there be an appearance by a royal mystery guest?

Sunday morning takes us to Wales and Ireland for a lovely Celtic brunch. We will conclude the business of the corporation and say farewell until our Third Quarterly Conference, February 25-27, 2022, at the Stockton Hilton, in Stockton, California, where the cruise will continue to exotic South America for "Carnivale."

Remember to get your passport stamped at every port of call, as all fully stamped passports at the end of the voyage will be entered into a drawing for a fabulous vacation package!

Pack your best cruise wear, book your ticket, be sure to grab your passport, and get ready to make wonderful memories aboard the S.S. LPI! We can't wait to see you and set sail once more!







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# TODAY'S RECRUITING

BY BETTY J. SYKES – SUBMITTED BY LOS ANGELES LSA

For the past 50 years, I have worked for different types of law firms and attorneys. I have seen the ups and downs in the legal industry. In addition to being a Legal Assistant to a successful defense attorney with a thriving and prosperous practice, I am also a Legal Recruiter for a well-respected personnel agency that has placed stellar candidates with mid-sized to global AM 100 law firms for over 35 years. There's nothing like being heavily relied upon by a busy partner; however, being a part of the bigger picture as a recruiter, does come quite close. Recruiting is, for the most part, very rewarding and beneficial for all three parties involved; the firm or company, candidate and recruiter. You get the unique opportunity to meet people in various stages of their careers. Whether you are an Attorney, Partner, HR professional, File Clerk, Secretary, Paralegal or Receptionist, eventually, everyone wants the opportunity to further grow and develop in their career or simply change it altogether.

Law firms are requesting more specified experience from candidates and readily prepared to compensate them substantially. There are Legal Assistants making up to six figures in salary because they are rightfully considered a valuable asset to the team. Firms know precisely what is needed to expand a practice to its fully earning potential. They know the type of candidate it will take to ensure the organization will continue to run smoothly from the top to bottom. Firms are looking for candidates who want to become an essential member of the team and offer specialized skills and training based on the practice group's needs. If you have the qualifications, we as recruiters will find you.

There are many diverse opportunities available today from Attorneys, Of Counsels, Special Counsels and Partners to Research Specialists (Librarian), Financing Pricing Analysts, Revenue Billing Specialists, Paralegal Program Coordinator, Patent and Prosecution Secretaries, Real Estate Secretaries, etc. Ironically, I have found that there is a constant shortage and high demand for expertly skilled Legal Secretaries/Assistants and Paralegals. They are truly the background for many firms and practice groups.

Sometimes in recruiting, we come across misleading resumes or untruthful applicants. For instance, sometimes a candidate will omit the fact that they have previously applied to or interviewed at a firm believing their chances of being reconsidered are greater with a recruiter. This is the furthest from the truth. Usually, with a recruiter or not, if a firm passed on your candidacy, they have their reasons, and nothing will change that even with assistance of a legal recruiter. Most applicants do not realize this, but there is a mandatory six-month to one year's time lapse before you can reapply to a firm.

It is always best to be transparent with your experience and abilities. The ideal candidate is one who can hit the ground running versus one who makes repeated mistakes. Firms are usually willing to train top candidates based on your first impression, so there's no need to practice such dishonest tactics.

Before and throughout the process of presenting a candidate for a position, we serve as the point of contact between the applicant and law firm. It is our responsibility to understand



movement between jobs as well as your experience, background, level of education (when appropriate), personal aspirations, and long-term expectations. We value our candidates, and our sincerest mission is to help elevate each one to the next level of their career.

As recruiters, we happily and equally serve our law firm clients and candidates to the best of our abilities. We understand the delicate balance of fulfilling our clients' support needs while also enhancing an individual's career path and personal growth.



**BETTY J. SYKES**, is an active member and Past President (1989-1991) of Los Angeles LSA. She is currently a Legal Assistant to Eddie J. Harris, Esq. and a Senior Staffing Specialist/Recruiter at The Emerald Agency.



**November 18, 2021; Noon**

## **Insurance Fraud: A Billion Dollar Business**

Presented by: Tamara Martin, Esq.

Deputy District Attorney with the San Diego District Attorney's  
Office's Insurance Fraud and Workplace Justice Division

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## December Webinar

**DECEMBER 10**

**12:00-1:00**

**NOTICE OF APPEAL: WHAT SHOULD BE ON YOUR  
CHECKLIST**

**MEMBER    NON-MEMBER**

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THE LIVE WEBINAR, LPI WILL ISSUE A FULL REFUND.

## LIST OF EVENTS DECEMBER 10

**12:00-1:00 PM**

**Notice of Appeal: What Should Be  
on Your Checklist**

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

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# NAVIGATING THE LEGAL FIELD AS A PERSON WITH AN “INVISIBLE” DISABILITY

BY JESSICA MELTON – SUBMITTED BY MT. DIABLO LPA

When hearing the word “disability”, many people immediately think of a person with a physical impairment. In the past, this would have been a correct assumption. However in more recent years, the disability community has been trying to change that way of thinking to include a category of disabilities called “invisible disabilities”. According to Forbes Magazine, in 2020, over 42 million Americans have a disability and over ninety-six percent of those disabilities are “unseen”.<sup>1</sup> In fact, there are millions of people who work in offices, firms, or the like who have a disability that you cannot see. These can range from learning disabilities to depression, to chronic illness and chronic pain, to PTSD, and beyond.

All disabilities are vastly different and each one presents their own set of challenges. Let me start by telling my story.

At the age of twenty-five after many years of searching, I was diagnosed with a rare blood disorder called Acute Intermittent Porphyria. This disease causes many symptoms, one of them being daily pain. This disorder requires regular medical treatments and a team of doctors to manage it. There are many days when I just want to stay in bed all day and do nothing because of the pain. However doing nothing is not an option for me. So every day I keep going.

Several years post-diagnosis, I knew from a personal experience that my goal was to become a paralegal. This was not an easy feat. In 2016 just as I was in the middle of the second quarter of my rigorous program, my blood disorder caused a secondary illness which needed to be treated right away. For the next year and a half, I ended up studying from a hospital bed for two days every week while I received an intravenous

medication with chemotherapy-like side effects. Luckily, after receiving this treatment for a total of three years, the medication proved to be beneficial. Even though I was sick, I was still required to take all the same classes as everyone else in the program to graduate with my paralegal certificate. During this time, I could have easily given up, called it quits, admitted defeat, but I kept going. Finally, in 2017, I graduated! I placed second in my class and was inducted into the honors society for paralegals called, Lambda Epsilon Chi (LEX).

Since most jobs in the legal field are full-time positions, it has been tricky finding my perfect fit because I can only work part-time. Between an endless stream of doctor’s appointments, medical treatments, and sick days, people like me with this set of circumstances, can sometimes have more trouble finding an employer who understands these needs.

So how can you help to change how invisible disabilities are viewed and handled at the workplace?

First, start by researching and familiarizing yourself with the Americans with Disabilities Act of 1990 (ADA).<sup>2</sup> In 1990, former President George H.W. Bush signed this act into law. Introducing this set of laws was a big step towards inclusiveness for people with all disabilities in the workplace and in schools. Unfortunately even today, there is still a long way to go. Understanding this act will not only give you some insight into the rights that people with disabilities are entitled to, but it will also help you to notice if your fellow colleague or employee is not receiving the accommodations that they should be getting in the workplace and what needs to be done to change that.



Additionally, many people with an invisible disability will not want to share with others that they suffer from an illness for fear of discrimination or embarrassment. That said, sometimes it may be easier for a person with a disability to work in a remote position or at a job which allows for flextime.

Finally, please do not confuse the word “disability” with “inability”. Just because we must work harder to get the same amount of work done in less time does not mean that we are not as capable as our fellow counterparts. In fact, being forced to work and live with extra challenges makes us a good hire. Chronic sufferers, can be extremely compassionate towards our clients, are very motivated, and are many times well versed in multi-tasking.

Let me finish by saying this: living every day with any kind of disability whether physical, emotional, or medical, is beyond difficult and some days are harder than others. However one thing is for sure. Navigating the legal field with an invisible disability may not be easy, but for me, being a paralegal is the most rewarding job in the world.

## ENDNOTES:

- <sup>1</sup> (Forbes Magazine, Invisible Disabilities: Break Down the Barriers (March 2020) <<https://www.forbes.com/sites/paulamorgan/2020/03/20/invisible-disabilities-break-down-the-barriers/?sh=761a7c12fa50>> [as of March 20, 2020].)
- <sup>2</sup> Americans with Disabilities Act of 1990, as Amended <<https://www.ada.gov/pubs/adastatute08.pdf>>  
This site explains the equal opportunity rights and accommodations for people with all disabilities.



**JESSICA MELTON**

is a graduate of John F. Kennedy University's legal studies program. She also obtained her associate degree in Special Education from Diablo Valley College. For the last two years, Jessica has been serving as Vice President of the Mt. Diablo LPA, in Northern California. She has worked as a contract paralegal in bankruptcy, personal injury litigation, Wills and Trusts, and family law. Jessica is currently seeking employment in the family law sector.

## QUARTERLY ASSIGNMENTS | 2021-2022

**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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& Beyond*

# CCLS QUIZ

## LEGAL COMPUTATIONS CALENDARING

DIRECTIONS: USING THE CALENDAR PROVIDED,  
DETERMINE THE LAST DAY FOR EACH ACTION BELOW.

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6					1	2	3					1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28				25	26	27	28	29	30	31

- YOUR TRIAL DATE IS MARCH 26. WHAT IS THE LAST DAY TO PERSONALLY SERVE INTERROGATORIES?
- YOUR DEMURRER IS BEING HEARD ON FEBRUARY 2. WHAT IS THE LAST DAY TO MAIL SERVE YOUR MOTION?
- A COMPLAINT FOR UNLAWFUL DETAINER WAS PERSONALLY SERVED ON JANUARY 11. WHAT IS THE LAST DAY TO RESPOND?
- GREAT AUNT BETSY DIED ON JANUARY 26. YOU FOUND OUT ON JANUARY 31. WHAT IS THE LAST DAY TO FILE THE ORIGINAL WILL?
- YOUR CASE MANAGEMENT CONFERENCE IS SCHEDULED FOR MARCH 6. WHAT IS THE LAST DAY TO FILE YOUR CASE MANAGEMENT STATEMENT?
- A SPECIAL MEETING OF SHAREHOLDERS HAS BEEN SET FOR MARCH 13. WHAT IS THE FIRST DAY TO PROVIDE NOTICE?
- YOUR MOTION FOR SUMMARY JUDGMENT IN AN UNLAWFUL DETAINER MATTER IS SCHEDULED FOR MARCH 23. WHAT IS THE LAST DAY TO PERSONALLY SERVE THE MOTION?
- YOUR CLIENT WAS PERSONALLY SERVED WITH A PETITION FOR DISSOLUTION ON FEBRUARY 1. WHAT IS THE LAST DAY TO FILE A RESPONSE?
- PLAINTIFF'S COMPLAINT WAS SERVED ON DEFENDANT ON FEBRUARY 5. WHAT IS THE FIRST DAY DEFENDANT MAY SERVE WRITTEN DISCOVERY?
- PLAINTIFF'S INCOMPLETE RESPONSES TO WRITTEN DISCOVERY WERE MAIL SERVED ON JANUARY 12. WHAT IS THE LAST DAY TO FILE A MOTION TO COMPEL FURTHER RESPONSES?

CCLS QUIZ ANSWERS ON PAGE 23

# SAVE THE DATE

## LPI'S 3RD QUARTERLY CONFERENCE BOARD OF GOVERNORS MEETING



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## November Webinar

**NOVEMBER 12**

**12:00-1:00**

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THE LIVE WEBINAR, LPI WILL ISSUE A FULL REFUND.

## LIST OF EVENTS NOVEMBER 12

**12:00-1:00 PM**

**Ex Parte Applications**

This webinar will go over the process of ex parte applications in the California Superior Court. This presentation will provide you with a guide to prepare the application and supporting documents, filing, serving and preparing your attorney to attend the hearing.

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# CCLS QUIZ

## ANSWER KEY

- |                |               |
|----------------|---------------|
| 1. January 26  | 6. January 12 |
| 2. January 5   | 7. March 16   |
| 3. January 16  | 8. March 5    |
| 4. March 2     | 9. February 5 |
| 5. February 20 | 10. March 2   |

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# SAVE THOUSANDS OF DOLLARS ON ESTATE PLANS – PLAN AHEAD!

BY MATTHEW SCHLAU – SUBMITTED BY LONG BEACH LPA

Estate planning is often put on the back-burner. Sometimes people never get around to it. However, planning ahead is important because doing so can save you thousands and thousands of dollars; especially if you live in Orange County. In this article, we'll discuss the practical implications of planning versus doing nothing and eventually going through probate.

## Key Takeaways

- Probate is time consuming, expensive and often gets messy
- Trusts and estates attorneys love probate because state-set fees are high, but we prefer those that plan ahead

According to Core Logic's 2020 Home Price Index, which we've mentioned before, the median home price in Orange County is \$900,000 (a 17.6% increase from 2020!). According to available demographic information from Onboard Informatics, the average net worth from an Orange County family, if increased by an equivalent percentage, is \$981,408. For our purposes, let take note of the lesser \$900,000 figure.

Now for probate. I'm sure you've heard of probate; that it's expensive, you should avoid it, it can be messy, etc. All of this is true, but the key is understanding the practical implications of probate because more often than not, at least in my experience, this is what will move the needle for most people and get them planning ahead; because if you don't plan ahead, there are very real consequences.

Before we get to the consequence that I want to focus on (and circle back to that \$900,000), first let's start with a general definition of probate:

Probate is the court-supervised administration of a decedent's estate. It can be a long process, generally lasting between 8 and 12 months in California. There is something called simplified probate, which for certain eligible estates can be a way avoid a full probate; full probate being the version that lasts quite long in California.

## Probate is also expensive. The state sets attorney's fees as follows:

- 4% of the first \$100,000; 3% of the next \$100,000; 2% of the next \$800,000; 1% of the next \$9 million; and so on. As you can imagine these fees get quite high.

On the one hand, as trusts and estates attorneys, we love probate because it means more fees. On the other hand, more fees isn't always the goal for us, even as business owners.

Actually, our ideal clients are your typical Orange County family, married, with a couple of kids, a home and some retirement assets; maybe they own a small business; maybe they have some investment properties.

These clients typically see the value in planning ahead and thus avoiding probate. We earn markedly lower fees in providing planning assistance to this type of client. The reason we prefer this transactional-based estate planning to probate despite the lower fees is simply because we like working with people when they're happy – things are good, let's check estate planning off our list.

Probate clients are in the midst of a very trying time. Usually we work with family members after the passing of a loved one. With all the weight of a death on their shoulders, they in turn have to deal with an attorney, a judge and a generally uncomfortable process that is out there for the world to see.



On top of that, probate usually gets messy. When money is involved, even the closest of families seem to run into trouble.

To avoid probate, you'll need a trust. Having a will alone is not enough. In fact, a will guarantees you'll go to probate.

To really see the consequences of failing to plan ahead and thus having to go through probate, let's take that \$900,000 into consideration. Let's also assume that number is the value of the entire estate at issue – meaning there are no other assets and we're just dealing with the value of the home (by the way if you're thinking "most people have a mortgage, so doesn't that affect the value" the answer is no, California only cares about the gross value of the estate).

So again, our number is \$900,000. What are the probate fees for an estate of that size? They are \$21,000. Of course your probate attorney fees would be higher if you used the \$981,408 number we mentioned earlier. Either way, \$21,000 is not an insignificant number at all. That's a lot of money for most families, and a lot of money that in turn cannot be inherited, cannot go



← Continued from page 25

to charity, etc. If there is not enough liquidity in the estate to pay these fees, that means selling the family house, selling stock, etc. to cover attorney fees.

As is clear with the recent swing in the real estate market (17.6% in one year!), time in the market is obviously the surest way accumulate wealth. This is as opposed to trying to time the market, a nearly impossible feat – who had a global pandemic in the midst of a regional housing shortage, followed by a supply-chain fiasco on their 2020-2021 bingo card anyway?

If you're forced to sell the family home, or sell family-inherited stock to pay attorney fees, there is a good chance you miss that next surge in price of your underlying asset; a tough pill to swallow and something that is not easily undone.

This situation is easily avoided by planning ahead. What we do with clients is sit them down in a complimentary consultation and go over the numbers. We'll end up with a personal ballpark probate attorney fee versus the estate planning fee. The savings and benefits in most cases are very clear.



**MATTHEW SCHLAU** has an extensive background in civil litigation. His experience also includes advising companies in private joint venture arrangements and serving as outside general counsel to review, draft, and negotiate contracts relating to a wide range of business transactions. He began his own practice, Schlau Rogers, so that he could permanently shift his focus from conflicts to building value. He now helps clients design, create, and grow by proactively addressing personal and business matters.

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# LPI CODE OF ETHICS – WORDS TO LIVE BY

BY HEATHER EDWARDS, LSI/LPI PAST PRESIDENT 2018-2020 AND LPI LEGACY PROJECT CURATOR

Have you ever thought of what you want your legacy to be? Life gives you many opportunities to build up your legacy so that you become immortal. So the question is, are you taking advantage of the opportunities life is offering you? Are you using your talents, skills, and potential to create a better life for yourself and others? Are you aware of how much influence you have on those around through your actions, words, and personal example? And do you honor that influence?

LPI has built an 87 plus year legacy. A piece of this legacy has been our CODE OF ETHICS. Words that we, as legal professionals, have lived by since 1934.

According to our LPI history, at a meeting of the Board of Governors of California Federation of Legal Secretaries on December 8, 1934, the following Code of Ethics composed by Evelyn Atwood was considered and adopted:

The first duty of a legal secretary is loyalty to her employer. It shall be the duty of every legal secretary to maintain at all times a high standard of courtesy in all contacts with law offices, clients, courts and any and all persons.

It shall be unethical for any legal secretary to violate any statute now in effect or to be enacted governing privileged communications.

It shall be unethical for any secretary or employee of any law office to divulge the contents of any documents in the possession of her employer without first having obtained the consent of said employer, or to discuss, maliciously or otherwise, with any person, matters of a confidential nature, knowledge of which may come to her by virtue of her employment.

It shall be the duty of every legal secretary to maintain harmonious cooperation with her associates.

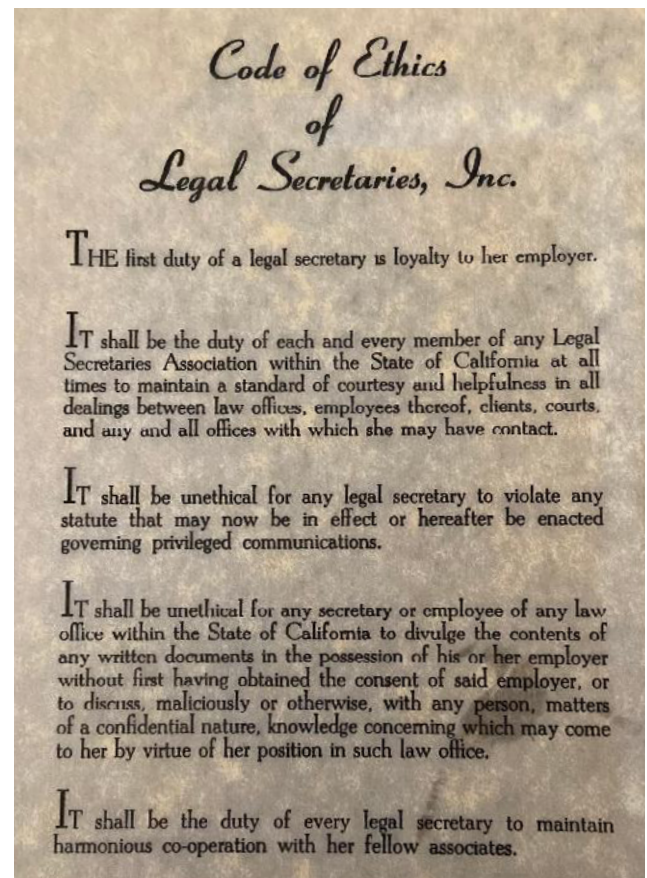
Each member of Legal Secretaries, Incorporated, and the National Association of Legal Secretaries (NALS) agreed to be bound by the foregoing Code of Ethics, which remained in effect until 1976. During that period circumstances arose which prompted consideration of a revised Code of Ethics, e.g., male members objected to the use of the feminine pronoun and many members felt that the Code of Ethics should be somewhat more affirmative.

At the annual convention of NALS in Denver in July 1976, a committee, of which Ivy W. Person, LSI Past President 1970-1972, of Bakersfield, California, was chairman, presented a new Code of Ethics for consideration. The following version was adopted and became binding upon all members:

Members of the National Association of Legal Secretaries (International) are bound by the objectives of this Association and the standards of conduct required of the legal profession. Every member shall:

Encourage respect for the law and the administration of justice; observe rules governing privileged communications and confidential information;

Perform all duties of the profession with integrity and competence; Promote and exemplify high standards of loyalty, cooperation and courtesy; and Pursue a high order of professional attainment.



Because of the action taken by the Board of Governors at the November 1981 meeting to withdraw from NALS, it became necessary to adopt a new Code of Ethics. A committee comprised of Virginia G. Haines, PLS, Chairman (San Francisco LSA), Helen Kouns (Alameda County LSA), and Bonnie Bustad (Ventura County LSA) were appointed to draft such a Code and at the February 1982 Board of Governors meeting the following Code of Ethics was adopted:

It shall be the duty of each member of LEGAL SECRETARIES, 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.

Continued on page 29 ➔



← Continued from page 28

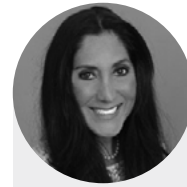
By order of the vote of the Board of Governors, the Code of Ethics of Legal Secretaries, Incorporated was dedicated to the memory of Joan M. Moore, PLS, LSI President 1980-1982.

On May 1, 2020, Legal Secretaries, Incorporated became Legal Professionals, Incorporated and with that, the Code of Ethics was amended to reflect the new name which remains in effect to date:

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

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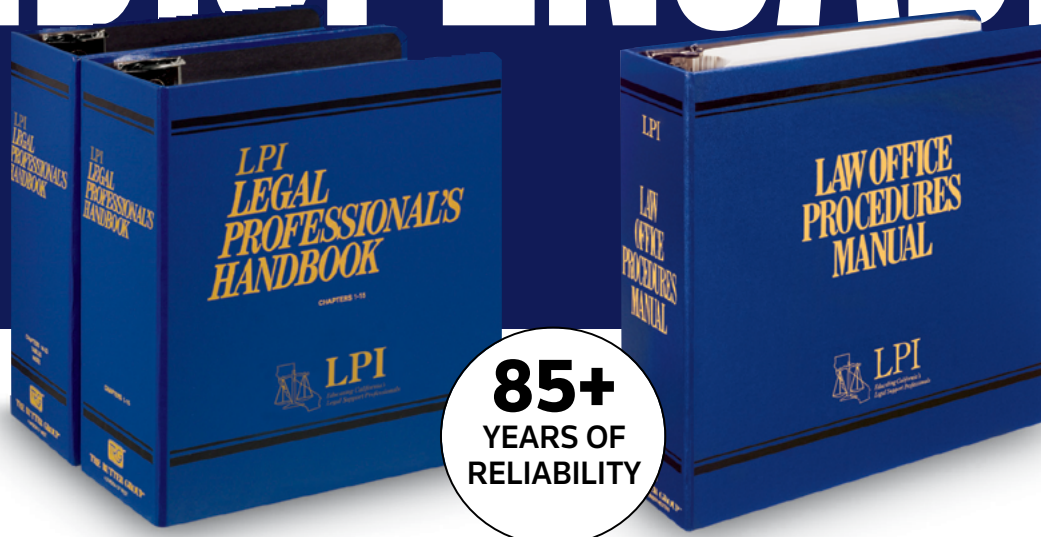
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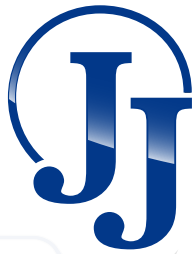
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