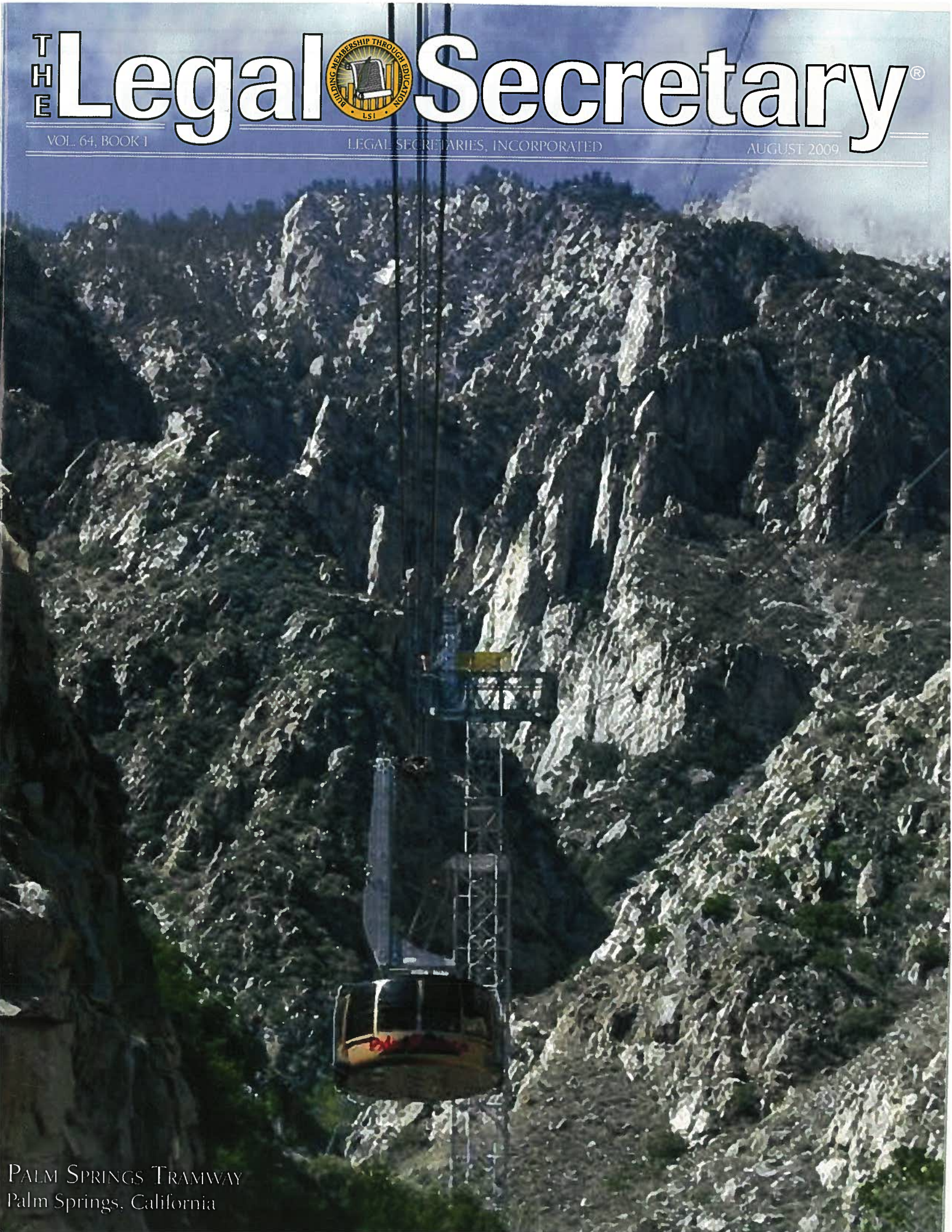


THE Legal Secretary®

VOL. 64, BOOK 1

LEGAL SECRETARIES, INCORPORATED

AUGUST 2009



PALM SPRINGS TRAMWAY
Palm Springs, California

AMERICA'S EXPERT LAW FIRM PRINTER



STUART F. COOPER
PROFESSIONAL BUSINESS PRINTERS
AND ENGRAVERS

◆ DEDICATED TO HELPING ATTORNEYS
& LAW FIRMS COMMUNICATE MORE
EFFECTIVELY & EFFICIENTLY
SINCE 1929

◆ PROVIDING THE MOST EFFICIENT
E-COMMERCE SOLUTIONS AND
COMPREHENSIVE SERVICE TO MEET
ALL OF YOUR NEEDS

◆ ENGRAVING, TRADITIONAL & DIGITAL
PRINTING AND PUBLISHING ARE DONE
ENTIRELY IN-HOUSE, ENSURING QUALITY &
REDUCING DELIVERY TIME AND COST

ART & DESIGN SERVICES
ONLINE ORDER ENTRY & FULL COLOR PROOFING SERVICES

COMPREHENSIVE IDENTITY SYSTEM MANAGEMENT SERVICES:
PRODUCTION, INVENTORY & DISTRIBUTION OF STATIONERY,
MARKETING, HR AND TRAINING PUBLICATIONS

EVENT PROMOTION & ATTENDEE LITERATURE

SOPHISTICATED DIGITAL PRINTING—
FULLY VERSIONED DIRECT MAIL PROGRAMS
SELF-PUBLISHING OF BOOKS, MANUALS & DIRECTORIES

ANNOUNCEMENTS, INVITATIONS & HOLIDAY CARDS

◆ VISIT: www.sfcooper.com E-MAIL: info@sfcooper.com
CALL: 800.421.8703 - TO REQUEST A FREE
CAPABILITIES BROCHURE OR SAMPLES

ATLANTA



LOS ANGELES

THE Legal Secretary®

VOL. 64, BOOK 1

LEGAL SECRETARIES, INCORPORATED

AUGUST 2009

Copyright 2009 Legal Secretaries, Incorporated. Printed in U.S.A.

COLUMNS

President's Message.....2

DEPARTMENTS

Legal Specialization
Section Workshops 8

Legal Specialization Sections
Membership/Renewal Form..... 10

Conference Registration 22

Conference Hotel Reservation 23

CCLS Exam Application..... 27

LSI Benefits..... 33

LSI Order Form..... 37

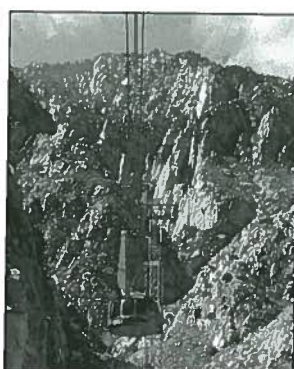
Dates to Remember..... 39

Websites 39

Advertisers Index 39

LSI Roster 40

COVER



Palm Springs
Tramway
Palm Springs,
California

Photo by
Palm Springs
Bureau of
Tourism

FEATURES

Building Membership Through Education 2
by Christa Davis

Election of Officers 2009 – 2010..... 4

The Part-Time Resident Tax Trap 5
by Christopher Manes, Esq.

Contest Winners..... 7

LSI's 2009 First Quarterly Conference – Just Hang Loose in Palm Springs..... 9
by Jennifer Ellis

Mr. Hospitality 11
by Maxine Marchus

LSI 2009 Annual Conference Photos 14

Making the Most of Your Time..... 16
by Kristi Royse

2009 – 2010 LSI Officers and Chairpersons 20-21

Legislative History Tips 24
by Carolina Rose, Esq.

LAWst in Space..... 26
by Sheryl Brown

Spreading the News About My First Conference 29
by Anita Kranzberg, CCLS

El Dorado LPA Annual Crab Blast..... 31
by Dana Carlson

A Student's Perspective 32
by Fabianna Perez

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

Copyright © 2009 by Legal Secretaries, Incorporated, P.O. Box 660, Fortuna, California 95540-0660. All rights reserved. Reproduction in whole or in part without the express permission of Legal Secretaries, Incorporated is prohibited. "The Legal Secretary" is registered trademark of Legal Secretaries, Incorporated.



THE LEGAL SECRETARY, published quarterly by Legal Secretaries, 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 LSI Corporate Office, P.O. Box 660, Fortuna, California 95540-0660. 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 Secretaries, Incorporated.

Editor: DEBORAH RICKERT, CCLS Printed by: MONARCH LITHO, INC.

Building Membership Through Education

LSI President



Christa Davis is President of Legal Secretaries, Incorporated and a member of Livermore-Amador Valley Legal Professionals Association. Christa started her legal career as a legal secretarial trainee in 1987. She has been working for Staley Jobson, a family law firm in Pleasanton since 1989, where she is currently the Administrator. Christa lives in Castro Valley with her husband and daughter.

The weekend of May 14 – 17, 2009, began the 75th year for Legal Secretaries, Incorporated. It really is amazing to think that just seventy-five years ago, what started with just a few legal secretaries became the outstanding corporation it is today. Quite a feat, but back then, life seemed to be less complicated and easier to become involved than it is today. Today we face the challenges of modern day technology, convoluted laws, stressful, busy lives, and the daunting task of maintaining this organization through volunteers.

It isn't easy but we are doing it and doing a great job. I often wonder how many corporations run in this manner have stood the test of time as we have. It is impressive that we have come so far. So what's the secret? Very simple – we care – we care about our careers, each other, and we care about the future of LSI. It's the magic of LSI. It's that magic that comes to life every quarter when we meet to conduct the business of the corporation, attend educational workshops, network with each other, and generally have a good time. We all have the desire to be a part of something and for us, that something is LSI.

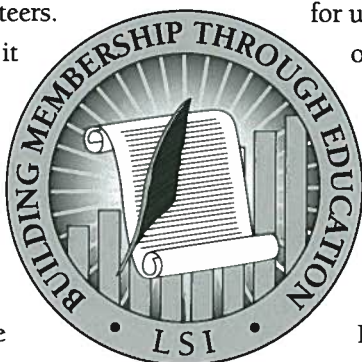
The magic continues through the years as we become more involved, gain knowledge, give it our all, and pass on that knowledge to new members. Then we step back to rejuvenate and let others take their turn. It's the magic of mentoring that keeps the history of LSI alive

and well. I would guess that the majority of our members were taken under the wing of a long standing member. We were mentored - the magic of mentoring. We were groomed, educated about the history and background of LSI; basically we were shown the ropes. Now, as the seasoned members, it is our turn. We have to draw in the new generation of legal professionals to join our ranks. It is our turn to pass the torch. We need to educate and mentor the new generation just as it was done for us. We must share the excitement

of LSI. It is not going to happen unless we take that step outside of our comfort zone and take a new member under our wing and mentor him or her. This is what has happened to the majority of us and that's how LSI grows – it's magic. It's the magic of LSI – it's how we grow – it's passing the torch.

With the new generation comes fresh knowledge of the law, procedures and technology - a completely different outlook. So while we teach the new generation about LSI, they teach us about the latest and greatest of law and technology. It's the fresh viewpoint that we need. And the magic continues. If you find yourself ready to take a step back, then take a step back, but don't take your experience and history with you. Share that with the new generation.

Over the past year, I have visited many local association meetings and events. It is amazing to watch the members at work - to see



how proud they are of their association and LSI, and how they work together. Even in these difficult times, when many associations are struggling they are able to present quality educational workshops, enjoyable meetings and social events and generally stick together to keep their association moving forward. In many instances, it is a core group of members that see these events through to a successful presentation. It reminds me of that famous story *Footsteps*. The story about being carried when you are unable to carry yourself. I think about that a lot and how it relates to LSI. Many struggle in these difficult times - experiencing layoffs and terminations. It's a difficult blow to accept, but we don't have to experience that alone. We have our fellow members to help us through those difficult times.

We have seen associations dwindle down to a bare few who work hard to keep the association active and carry the others who cannot at that point give of their time. Soon enough the spark ignites, members rejuvenate, new members join and the association soon begins to rekindle, rebuild, and thrive. For those of you who question whether that can happen, I urge you to talk to the members from associations that have gone through this and who have experienced the rejuvenation. It can happen to your association and with team effort, it will. Don't give up.

Over the past year, I have encouraged everyone to step outside of their comfort zone, get out of their box and approach things that they would not normally tackle. I've had to do that as well, and didn't want to do it alone. So

many have done just that – they have stepped outside their comfort zone – each in their own way. Some by accepting an appointment to be an LSI Chairman; some by taking a position on their local association board; some by agreeing to stand before the membership and give an inspirational or memorial message, and some just giving more of their time to LSI. They all have said they were scared to death at first, but they dove in and accepted the challenge, and each one was glad they did. They all have grown in some way and are

proud of their accomplishments as they should be. To see their excitement and experience their enthusiasm tells me that the magic of LSI continues to work.

As I said before, we are the new generation of LSI. We need to band together and realize that as members, we all have the same goals: to continue to grow both professionally and personally through education – and bring this organization successfully through the next 75 years. We have to realize that we are one in this organization. No one

person is in charge of LSI or local associations. We have to do this together, because it is the selfless acts of each member that will make this organization a success.

I would like to remind everyone to keep the goals of this organization in the forefront. We are each a part of this successful professional corporation, but yet we are one. Just one by ourselves, we cannot accomplish much, but together, we can pretty much do anything we want. It just takes imagination, determination and working together towards our goal of providing quality education to California's Legal Professionals. □



Election of Officers 2009 – 2010

The election of officers for fiscal year 2009 – 2010 was held at the Long Beach Hilton in Long Beach, California, on Saturday May 16, 2009. The Delegates elected the following Officers for fiscal year 2009 – 2010.

President	Christa Davis Livermore-Amador Valley LPA
Vice President	Brooke Atherton, CCLS Butte County LPA
Executive Secretary	Sandra T. Jimenez, CCLS Imperial County LPA
Treasurer	Mary Beaudrow, CCLS Mt. Diablo LSA

On Sunday, May 17, 2009, after installation of the above elected officers, LSI President Christa Davis announced the following appointed officers to serve for fiscal year 2009 – 2010.

Executive Advisor	Lorraine Bettencourt, PLS, CCLS, Merced County LPA
Parliamentarian	Kay Bliss, PLS, Riverside LPA
Editor in Chief	Lugene Borba, CCLS, Stanislaus County LPA
Editor, The Legal Secretary	Deborah Rickert, CCLS, Orange County LSA
Educational Program Coordinator	Jennifer Page, CCLS, Marin County LPA
Historian	Denise Lopes, CCLS, Humboldt County LPA
Legal Specialization Section Coordinator	Margaret Tovar, CCLS, Los Angeles LSA

The Part-Time Resident Tax Trap

Submitted by
Desert Palm LPA



Christopher S. Manes is a partner in the Law Firm of Sanger & Manes, LLP. Mr. Manes graduated from Boalt Hall (UC Berkeley) law school in 1992 and received his BA from UCLA and a Master's Degree from the University of Wisconsin. He frequently speaks on residency tax issues and probate litigation matters.

Most of the world knows the Palm Springs area for its picturesque golf courses, celebrity homes and halcyon weather. Among the taxing authorities in Sacramento, however, the words "Palm Springs" conjure up less carefree images.

Spurred by the state's appetite for tax revenues, the Franchise Tax Board, California's main taxing authority, has tapped into a new revenue source; taxing seasonal visitors to our area as state residents.

This is how it works; California taxes residents on their worldwide income, from whatever source, no matter how far-flung. In contrast, California taxes nonresidents only on their income derived from California sources. These might include a limited partnership or rent from an investment property. Since California has some of the highest income tax rates in the country, visitors who suddenly find themselves defined as "residents" may face a large and unexpected tax liability.

Obviously, the Franchise Tax Board would like to claim everybody who sets foot on California soil as a resident and subject everybody's income to California tax. As many seasonal visitors have discovered, the FTB's policies don't fall short of its wishes.

Over the past five years, a special division of the FTB has systematically targeted part-time residents for audit. Though Santa Barbara, Los Angeles and Sonoma counties experience their share of audits, the typical casualty is the Palm Springs affluent snowbird who wings his or her way to a California vacation home to escape the winter blasts of home. In fact, many of the major cases in residency taxation are eerily similar: They usually involve Midwesterners who own vacation homes in the Coachella Valley. If the FTB

finds significant taxable income coupled with any meaningful contacts with California (such as a vacation home, business interest or long visits to the state), the FTB likely will launch a full-blown residency audit.

These audits are the equivalent of the old-fashioned speed trap, with the difference that a speed trap usually nets the state about \$50 while these residency audits can often fill the state's coffers with thousands upon thousands of dollars. Not to mention years and years of legal wrangling.

To establish legal residency, the FTB auditors appear out of nowhere to interview neighbors. They subpoena the taxpayer's utility bills, credit card records and country club charge slips. They solicit affidavits from friends (and enemies!). In general, they pry into the taxpayer's private affairs.

Unfortunately for most taxpayers, "residency" is a legal term of art, one that may have nothing to do with a person's honest belief that his or her real home lies outside California. As a result, the outcome of a residency audit often turns on seemingly trivial facts with no legal significance for a non-lawyer.

For example, our firm handled a case in which the FTB concluded that a Texas woman was a California resident despite the fact that all of her business, social and family ties were in Texas and her sole California contacts were a second home in the desert and a country club membership. The basis of the FTB's decision was that the woman put her local subscription to the Los Angeles Times on hold when she left the desert and returned to Texas. The Times, it so happens, calls that a "vacation hold." In the auditor's creative mind, this meant that her Texas trips must be vacations, which made California her permanent home. We won the case on appeal.

(Continued on page 6)

Under California law, a person who stays in the state for other than a temporary or transitory purpose is a legal resident, subject to California taxation. Basically, brief vacations or transactions, such as signing a contract or giving a speech, constitute temporary or transitory purposes that do not confer residency. Every other kind of visit can confer such a status, including coming to California for health reasons, extended stays, retirement or employment that requires a long or indefinite period to accomplish.

How does the Franchise Tax Board determine whether a visit has a temporary or permanent purpose? It applies the "Closest Connection Test." This refers to the state with which a person has the closest connection during the taxable year. For the FTB, this literally means counting all the California contacts a person has and comparing that number with the non-California contacts. Of course, some contacts simply weigh more than others. A job or real estate ownership indicates a closer tie than merely enjoying a round of golf at a country club or a concert at the McCallum. The weightiest factors for residency are:

- Ownership or lease of real estate.
- Business interests or employment.
- Schools used by children.
- Membership in clubs.
- Bank accounts or safety deposit boxes.
- Use of professional services such as accountants, doctors, dentists and lawyers.
- Automobile registration and license.
- Family ties and social life.
- Appearance in telephone or social directories.
- Location of personal belongings such as clothing, family photo albums or kitchenware.
- Jury duty.

The FTB, which can be somewhat impressionistic in its application of the law, often disregards these factors and bases its decisions on quirky logic as our Texas client discovered. In another case our firm handled, the FTB argued that an elderly South Dakota couple with a second home in Palm Springs were residents because during their seasonal stays here, they would fly overseas or go on a cruise. According to the FTB, if the couple left Palm Springs to go on a vacation, they could not be on

vacation while in Palm Springs. Again, the FTB eventually lost, but not until taxpayers incurred tens of thousands of dollars in legal and accounting fees.

Here are ten warning signs of a possible FTB audit:

1. **Six Months.** You spend more than six months in California, and especially if you spend more than nine. (This creates a legal presumption of residency.)
2. **Second Home.** You work out-of-state, but own a second home in California and regularly visit or vacation, especially if your stays here total more than six months during any year.
3. **Property Storage.** In anticipation of moving to or retiring in California in the future, you begin to ship personal property ahead of your move for storage here.
4. **Keeping Contacts.** You plan to move away from California, but you retain business interests, a vacation home or other contacts.
5. **Point of Departure for Vacations.** You come to your vacation home in California, and go on to other vacation spots from here, and return from vacation to California.
6. **Multiple State Contacts.** You have contacts with multiple states, including California.
7. **Low-Tax State.** You're selling stock or other property in a state with low or nonexistent income taxes, while having California ties.
8. **Selling Out-of-state Residence.** You own a second home in California, and sell your out-of-state residence.
9. **Employment.** Your firm sends you to California to work for an extended period of time.
10. **FTB Notice.** You receive an FTB notice asking information about why you didn't file a nonresident return for income reported to the FTB (through a Form 1099) from a California bank or broker.

The key to winning a residency audit, therefore, is to avoid one in the first place. If any red flags are fluttering over your desert vacation paradise, you may want to minimize your exposure by carefully examining the rules of residency thereby decreasing your chances of getting one of those dreaded audit letters in the mail. □

Contest Winners!

At LSI's 75th Annual Conference held May 14-17, 2009, in Long Beach, California, the winners of the annual contests were announced. They are as follows:

MEMBERSHIP CONTEST

GROUP A (5 to 30 members)	Santa Cruz County LPA with an 11% increase
GROUP B (31 to 50 members)	Livermore-Amador Valley LPA with a 3% increase
GROUP C (51 to 75 members)	San Mateo LSA with a 5% increase
GROUP D (76 to 95 members)	Long Beach LSA with a 27% increase
GROUP E (95+ members)	San Diego LSA with a 23% increase

HISTORY BOOK CONTEST

CLASS A (5-30 members)	No entries
CLASS B (31-50 members)	
First Place:	Stanislaus County LPA - Historian: Linda Brown, CCLS
Second Place:	Stockton-San Joaquin LPA - Historians: Diana J. Kaighn, PLS & Colleen Young
CLASS C (51-75 members)	No Entries
CLASS D (76-95 members)	
First Place:	Orange County LSA - Historians: Donna Vogt & Deborah Rickert, CCLS
Second Place:	Long Beach LSA - Historian: Denise Aguilar, CCLS
CLASS E (over 95 members)	
First Place:	Sacramento LSA - Historians: Cyrene Farrell, CCLS & Terry Olson

SCRAP BOOK COMPETITION

First Place:	Alameda County LSA - Historian: Bryana Schroder
Second Place:	San Diego LSA - Historian: Ashley Walton & Linda Moore
Third Place:	San Mateo County LSA - Historian: Donna Bottarini
Fourth Place:	San Gabriel Valley LSA - Historian: Darlene Martinez

MEMBER'S CHOICE AWARD

History Book	Orange County LSA - Historians: Donna Vogt & Deborah Rickert, CCLS
Scrapbook	Alameda County LSA - Historian: Bryana Schroder

BULLETIN CONTEST

CLASS A (5-30 members)

First Place	El Dorado County LPA, Dana Carlson, editor
Second Place	Conejo Valley LPA, Barbara Haussmann, CCLS, editor
Third Place	Desert Palm LPA, Donna Lozano, editor

CLASS B (31-50 members)

First Place	San Gabriel Valley LSA, Coninne Patera, editor
Second Place	Livermore-Amador Valley LPA, Cheryl L. Kent, PLS, editor
Third Place	Los Angeles LSA, Patricia V. Banks, PLS, editor

CLASS C (51-75 members)

First Place	Mt Diablo LPA, Maria Bishop, CCLS, editor
Second Place	Beverly Hills/Century City LSA, Mimi Wong Titus, CCLS, editor
Third Place	Humboldt County LPA, Kathy Parker, editor

CLASS D (76-95 members)

First Place	Orange County LSA - Dee Johnson, editor
-------------	---

CLASS E (over 95 members)

First Place	Sacramento LSA, Cyrene Farrell, CCLS, editor
Second Place	San Diego LSA, Linda L. Moore, editor

SCHOLARSHIP WINNERS

PLAN A - COLLEGE STUDENT

First Place:	Orange County LSA	Kathryn Olson
Second Place:	Mt. Diablo LPA	Luzmartiza Suarez
Third Place:	San Francisco LPA	Kimberly Cummiskey
First Alternate:	Riverside LPA	Sonia Lopez
Second Alternate:	Sacramento LPA	Anne Kirchner-Snelgrove
Third Alternate:	Los Angeles LSA	Yara Cristina Freitas

PLAN B - HIGH SCHOOL SENIOR

First Place:	Los Angeles LSA	Patricia Alejandra Martinez
Second Place:	Mt. Diablo LSA	Alexander Zou
First Alternate:	Merced County LPA	Chuar Herr
Second Alternate:	Ventura County LPA	Jessie Autumn Peterson

PLAN C - RE-ENTRY LEVEL

First Place:	Orange County LSA	Bonita Chavis Baranya
Second Place:	San Francisco LPA	Nancy Krieg
Third Place:	Los Angeles LSA	Sharon Rose Hatch
First Alternate:	Stanislaus LPA	Susan Anne McClain

LEGAL SPECIALIZATION SECTION WORKSHOPS
1st Quarterly Conference – August 2009 – Palm Springs Hilton Hotel – Host: Desert Palm LPA

REGISTRATION FORM - DEADLINE IS MONDAY, August 10, 2009

Registration **MUST** be **RECEIVED** by each Section Leader **on or before the deadline**.
 Please make advance reservations so materials may be prepared. **Please check appropriate boxes below.**

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

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

PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"



LSI SECTION MEMBER:
 Free with Advanced Reservations
 \$5.00 at the Door/After Deadline
 Handout Only: \$5.00

LSI NON-SECTION MEMBER:
 \$10.00 with Advanced Reservation
 \$15.00 at the Door/After Deadline
 Handout Only: \$10.00

NON-LSI MEMBER:
 \$15.00 with Advanced Reservation
 \$20.00 at the Door/After Deadline
 Handout Only: \$15.00

Friday, August 14, 2009 -- 7:30 p.m. to 9:00 p.m.

TRANSACTIONAL LAW:

*"Unlawful Detainer –
 From the Day You Don't Pay to the Day You Go Away"*

Speaker: Byron Cornelius, Esq.

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

Send to: Mae Brooks, CCLS, Transactional Law Section Leader
 1050 S. Kimball Road, Ventura, CA 93004
 (H) 805-642-6478 (O) 805-659-6800 FAX: 805-659-6818
 Email: mbrooks@fcoplaw.com

CRIMINAL LAW:

*"Criminal 101 –
 From Doing the Crime to Doing the Time"*

Speaker: John Patrick Dolan, Esq.

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

Send to: Cheryl Kent, PLS/CCLS, Criminal Law Section Leader
 5534 Blackbird Drive, Pleasanton, CA 94566
 (H) 925-462-3440 (O) 925-837-0585 FAX: 925-838-5985
 Email: clkcls@comcast.net

Saturday, August 15, 2009 — 10:30 a.m. to 12:00 p.m.

PROBATE & ESTATE PLANNING:

*"Rogue Executors, Administrators
 & Trustees"*

Speaker: Henry Wells, Esq. - *Best, Best & Krieger*

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

Send to: Leslie Ames, CCLS, Probate/Estate Planning Section Leader
 1500 – 4th St., Eureka, CA 95501
 (O) 707-442-0500 FAX: 707-443-2973
 Email: eurekalaw@aol.com

FAMILY LAW

"When Bankruptcy & Divorce Collide"

Speakers: Diane Mecca, *Paralegal* - and -
 Stephanie Harrison, *Family Law Section Leader*

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

Send to: Stephanie Harrison, Family Law Section Leader
 c/o Law Offices of Marvin J. Brown
 720 West 19th St., Merced, CA 95340
 (H) 209-723-4479 (O) 209-384-0123 FAX: 209-384-1661
 Email: stephmjb@sbcglobal.net

Saturday, August 15, 2009 — 4:00 p.m. to 5:30 p.m.

LAW OFFICE ADMINISTRATION

"Surviving Layoffs"

Speaker: Steve Gomez - *Ajilon Professional Staffing*

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

Send to: Jan Vornkahl, CCLS, LOA Section Leader
 3553 Sutton Loop, Fremont, CA 94536
 H) 510-790-8337 (O) 415-984-8341 FAX: 415-226-0735
 Email: jvornkahl@nixonpeabody.com

CIVIL LITIGATION:

"The ABC's of e-Discovery"

Speaker: Madison Spach, Jr. - *Spach, Capaldi & Waggaman LLP*

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

Send to: Elizabeth Adame, CCLS, Civil Litigation Section Leader
 P.O. Box 4344, El Centro, CA 92244
 (H) 760-352-8333 (O) 760-352-4001 Fax: 760-352-5561
 Email: liz.adame@sbcglobal.net

Name: _____ PLS/CCLS/Paralegal E-mail: _____

Address/City/State: _____

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

Method of Payment: ☐ Check ☐ Credit Card Number _____ Expiration Date: _____

Name on Credit Card: _____ Card Verification Number: _____

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

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these workshops have been approved for minimum MCLE/CLE credit of 1.25 hours each, by the State Bar of California.

LSI's 2009 First Quarterly Conference – Just Hang Loose in Palm Springs

First Quarterly
Conference Chair



Jennifer Ellis is the youngest member of Desert Palm Legal Professionals Association, having joined at the age of 22. She is very excited to be hosting her first conference.

Desert Palm Legal Professionals Association invites you to come hang loose and join us in Palm Springs as we host Legal Secretaries, Incorporated's First Quarterly Conference at the Palm Springs Hilton, August 14-16, 2009.

The Palm Springs Hilton is located in downtown Palm Springs and is a short five minutes from the Palm Springs Regional Airport. The nightly room rates are \$89 plus hotel tax and resort fee. There is a shuttle from the Palm Springs airport and parking is included in the resort fee. All guest rooms are king or double-queens with private balconies or patios. There is a swimming pool, a complete body spa, a tennis club and health club. Late arrival and check-out times are available. Please remember to bring your bathing suit!

We have an entertaining evening planned for the Friday night luau reception, and the Saturday evening banquet will be a semi-casual evening with exciting entertainment for persons of all ages. Please be sure to wear your best Hawaiian outfit!

While visiting us in Palm Springs, we invite you and your family to enjoy our valley and partake in some of the many activities the desert has

to offer. The Palm Springs Desert Museum is within walking distance of the Palm Springs Hilton. The Palm Springs Air Museum, Palm Springs Ariel Tramway, Children's Discovery Museum of the Desert, Living Desert Wildlife Park, Shields Date Gardens and Moorten Botanical Gardens are just some of the many places to visit. For you shoppers, please visit our wonderful shop-lined streets in downtown Palm Springs and El

Paseo in Palm Desert. Also, Cabazon Outlet stores are just a few miles outside of Palm Springs. For the gamer in you, we have several casinos with the Spa Hotel and Casino neighboring the Palm Springs Hilton. For you golfers, our desert area is renowned for its world class

golf courses.

For more information on all the fun of the desert, please visit the Palm Springs Bureau of Tourism website at www.palm-springs.org.

If you need more information about our conference or if we can make your stay in Palm Springs more enjoyable, please let me know. I can be reached by email at jennellis21@yahoo.com or by phone at (760) 239-1426. We look forward to you joining us to Just Hang Loose in Palm Springs. □



LEGAL SPECIALIZATION SECTIONS

Of LEGAL SECRETARIES, INCORPORATED

MEMBERSHIP APPLICATION / ANNUAL RENEWAL FORM

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

Mail to: **Margaret Tovar, CCLS, Legal Specialization Coordinator,**
12412 Camilla Street, Whittier, CA 90601-3305

Enclosed is payment of my dues for the fiscal year 8/1/08 through 7/31/09 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

Method of Payment: Check, payable to "LSI," enclosed ☐ VISA ☐ MASTERCARD ☐

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

Name on Credit Card: _____ **Card Verification Number** _____

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

NEW RENEWAL

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



(PLEASE PRINT OR TYPE)

NAME: MR./MRS./MS. _____

ADDRESS/CITY/STATE/ZIP _____

LOCAL ASSOCIATION: _____ LSA/LPA

RESIDENCE PHONE () _____ BUSINESS PHONE: () _____

E-MAIL ADDRESS(ES): _____

EMPLOYER: _____

EMPLOYER'S ADDRESS: _____

PREFERRED MAILING ADDRESS: ☐ HOME ☐ OFFICE ☐ E-MAIL

YEARS OF LEGAL EXPERIENCE: _____

SPECIALTY: _____

FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area): _____

Mr. Hospitality

Submitted by
Merced County LPA

April Showers bring May flowers, Don Lee thinks he is a real dandi-lion. Leave a bouquet of messages. This is the message you get if you try to reach Don at his home phone.

I was calling Don to ask him how he would describe himself, so after hearing his message there was no need to ask him. "A real dandi-lion" is a pretty good description.

Most of the LSI members attending conferences know Don Lee as "Mr. Hospitality" or the man with the camera giving orders as he sets up his shots.



When Merced's Lorraine Bettencourt was installed as President of Legal Secretaries Incorporated Don Lee decided he would open his official "Hospitality Suite" during her 2-year term. Don opens his door from 2:00 pm to 6:00 pm and provides all visitors to his suite a frosty Margarita, a glass of wine or an icy soda, along with myriad snacks and dips. You don't need his room number, just his floor, because as soon as anyone gets off the elevator on his floor they can follow the happy sounds to his room. Many times it is standing room only with Don hosting a room full of women and an occasional male. Maybe this is the part that delights Don so much? It is the spot to kick back during an extremely hectic weekend and unwind for a few minutes before moving on to the next meeting or seminar. The "Hospitality Suite" has been such a hit and so much fun for Don that he has decided to continue hosting this "oasis," even though Lorraine's term is over. I'm sure that is really good news for all attendees.

Another thing Don does at conference is he makes sure he meets with every vendor, visits with them and takes their picture, welcoming and thanking them for being in attendance. After the conference he sends each vendor a picture with a note of thanks. I'm sure this emphasizes our appreciation for their participation.

Although this is pretty much the same image he portrays at his local chapter, Merced County Legal Professionals Association, he is so much more. Even though Don Lee is not the chapter historian, you can always count on receiving a package of photographs after every meeting, seminar or special event. Don wanders around the room making sure to photograph every table. He photographs speakers, and memorializes award recipients, chairpersons, and whomever he happens to find interesting. Members look forward to attending meetings and discovering what surprise Don has provided on the dining table, sometimes candy cups, sometimes snack packs, sometimes toys, but always you will hear the exclamations of "Oh how cute!" and "Don did it again!"

During our annual BBQ fundraiser Don Lee is on site from 8:00 am until 11:00 pm. He is helping with moving and setting up tables, cleaning floors and windows, setting up decorations, and of course, making sure all the workers have their donuts and coffee for energy. He makes sure all the clean-up is done after the event and everyone is safely in their cars and out of the parking lot.

One thing few people know about Don: Every day, without fail, Don provides breakfast and lunch for two of Merced's homeless population in the Court House Park. When he is scheduled to be out of town he makes arrangements for someone to take care of these two individuals. This is just one of the many charitable projects Don is involved in. Yesterday when I reached him we didn't have much time to talk. He was in the middle of cooking dinner to deliver to his "people."

Don Lee does not like attention coming his way, but no matter what, he is our Man for all Time! Here's to you, Don. Hip, hip, hooray! □



Maxine Marchus is a member of the Merced County Legal Professionals Association. She has worked in the legal field since 1984, and has worked for the law firm of Morse & Pfeiff since the partnership began in August 1997, where she is currently the office manager for the firm. Maxine lives in Merced with her husband Duane, and spends her leisure time either bonding with two of her granddaughters who live closest to her, or scrapbooking with them.

Chapter Achievement Contest Results

The Golda J. Cooper Chapter Achievement Contest was established years ago in memory of Golda J. Cooper, President of the Stuart F. Cooper Company, who was a staunch supporter of this organization.

The winners of the 2008 – 2009 Golda J. Cooper Chapter Achievement Contest were announced at the Annual Conference Banquet on Saturday May 16, 2009, at the Long Beach Hilton in Long Beach.

The winners are listed below:

Group A – Membership from 5 – 30 members

Group B – Membership from 31 – 50 members

Group C – Membership from 51 – 75 members

Group D – Membership from 76 – 95 members

Group E – Membership from 96 + members

Conejo Valley LPA – 10,905 points

Merced County LPA – 24,020 points

San Mateo County LSA – 22,600 points

Orange County LSA – 33,650 points

San Diego County LSA – 57,855 points

We bring green technology to your transcripts—*anywhere.*



For more than 20 years, Peterson Reporting has partnered with law firms the world over to bring their transcripts to life with a combination of technology and talent. Cutting-edge digitized transcripts and exhibits coupled with our online depository allow us—and you—to work in a more environmentally-friendly way. From video conferencing to complete trial presentation support, turn to Peterson for all of your litigation needs.

Locally-owned, globally known.

Reporting
Videography
Trial
Presentation
Free
Conference
Rooms
Video
Conferencing
Services
Global Reach
Complex
Cases
Accurate, Fast

Call to request green delivery of your transcripts and receive a discount.

530 B Street, Suite 350
San Diego, CA 92101
bookadepo.com

619 260 1069
Since 1986


Peterson Reporting
Truth and Technology, Transcribed.

LSI's Honorary Member Kalman S. Zempleney II, Esq. Sends His Thanks

CONTINUING LEGAL EDUCATION  PROGRAMS AND PUBLICATIONS

THE RUTTER GROUP™
A DIVISION OF WEST, A THOMSON REUTERS BUSINESS

KALMAN S. ZEMPLENEY II, Esq.
Executive Director
and General Manager

May 18, 2009

Christa Davis, President,
and all members of
Legal Secretaries, Incorporated

Re: My SURPRISE "Honorary Member" Status!

Dear Christa and all LSI members,

I was delighted to be the keynote speaker at the Seventy-Fifth Annual Conference of Legal Secretaries, Incorporated, in Long Beach this past weekend. I really had a wonderful time seeing many old friends and making quite a few new ones, as well.

As I mentioned in my remarks, I was also thrilled to be involved in the CCLS luncheon, as I (and TRG) believe so strongly in your outstanding educational programs. Kudos to all who are, or have been, involved in CCLS!

Now about the SURPRISE: You really turned the tables on me and truly surprised me with a very rare and cherished LSI "Honorary Member" plaque and status! As many of you could tell, I was quite touched and honored with your kindness. I have always felt a part of LSI, and now you made it official. Thank you so much!

Warmest personal regards,

Kalman

15780 VENTURA BLVD., SUITE 630, ENCINO, CA 91436-3022
(818) 990-3260 (800) 747-3161 FAX (818) 986-2180
www.RutterGroup.com • www.RutterOnline.com

LSI Annual Conference 2009





Making the Most of Your Time

Submitted by
Alameda County LSA



Kristi Royse, principal of KLR Consulting, specializes in working with individuals and teams who want to excel and capitalize on their strengths. She partners with leaders and their teams to improve communication, implement change, align their organizational values and goals and move to higher levels of performance. KLR Consulting's programs are direct, specific, and drive the bottom line. Kristi is a nationally recognized speaker, facilitator, management consultant, executive coach, and trainer. Since 1987 she has been helping leaders to advance their teams and assisting teams to take advantage of their collective experience to achieve greater results. Kristi can be contacted at Kristi@KLRConsulting.com.

By not maximizing your personal productivity and accurately tracking your time, you are under billing for actual work done by 10-25%. If you are an attorney generating \$400,000 in annual billings, this is costing you or your firm \$100,000 in lost revenues.

Time management is difficult for attorneys, and it's a flawed concept: you can't really manage time. It is finite. What we all know and talk about is, in fact, how we can manage ourselves better. So, if you want to manage your time better, you have no choice but to learn to manage yourself better.

This article contains a sampling of the many techniques I have learned, from my own experience in guiding law firms, which can help 1) break through the over-commitment and chaos, and 2) gain the benefit of doing the work rather than dealing with obstacles to getting work done. You may even end up with "free time" to enjoy some fun!

Tip 1 - Give Reality a Hug

Most people think they know more about how they spend their time than they actually do. We really believe our memories are good enough for an accurate account of the hours and minutes we spend on a given task. Here's the truth: no one can really master their time until they know how they spend their time now.

If time seems to always be getting away from you, the Time Mastery Profile from Inscape Publishing can help you understand how you manage your time; these insights can help you see where your time goes and then adjust your time management skills to give you more of what you want and need. This tool does more than just tell you how you manage your time, it helps you develop a plan that you can implement to control the time around you.

Tip 2 - How to Organize Your Day and Week More Effectively

One of the worst parts about being too busy is the feeling of being overwhelmed. Feeling overwhelmed happens to me most frequently when I do not have a clear written list of the work that needs to get done. This results in "thought attacks," where task after task comes into my mind and builds up a mountain of responsibility that seems impossible to manage.

I have found that simply writing down everything that needs to get done makes the overwhelmed feeling go away—even though the work doesn't. A "master list" will get everything out of your head, whereas a "to-do list" only includes tasks you need to complete.

A master list is updated at the end of each day. Fifteen minutes before you leave work, stop responding to emails, phone calls, and other requests. This is *your* time. With your calendar open and your master list in front of you, let your mind wander. Brainstorm and document whatever pops into your head.

I am sure you are thinking, "Yeah right, and how am I going to find an extra fifteen minutes in my day, let alone private time?" As you improve your efficiency and become more organized it will become easy. You could begin by closing your door or placing a "gone fishing!" sign outside your cubicle. Maybe by the end of the month, your example will have everyone on your team using this valuable planning time.

Set aside time each Friday afternoon to use your master list to plan your schedule for the following week. You can review the current week while your activities are all still fresh in your mind. Assess what you accomplished and what remains to be moved to next week and on what day. This will allow you to enjoy your weekend more and leave work at work! When you plan for

next week—particularly Monday—you don't have to spend the weekend worrying about work.

"Let our advance worrying become advance thinking and planning." - Winston Churchill

Tip 3 - Managing Email

Managing email is one of the most commonly cited frustrations when the discussion turns to how we stay sane in the workplace. Email is the most abused form of communication in the workplace today—and may be the biggest factor in the sorry state of communication in corporate America. It is the reason that a number of companies are experimenting with banning email usage once a week.

Email is one of the biggest interruptions in today's workplace. If your computer automatically notifies you when you receive email, turn that function off—especially during your "veggie" time. Instead, set up times to check email three times a day, or once per hour. This method is one of the fastest ways to improve productivity.

A client of mine was in the habit of checking his email throughout the day—each time he heard a ping. Then he created a new system of checking it three times a day, at 10:15, 2:30 and 5:30. Whereas he previously could not keep up with his messages, with his new approach he discovered he could clear his In Box each time he opened it—the reward for fully focusing his attention on email for 45 minutes at a time. He also reset the expectations of all the people he regularly communicates with by e-mail, advising them that he could be reached for an immediate response to urgent matters by phone.

Kristi's top tips for improved email management:

- Do it now and/or delete it now. Act on and respond to your messages the first time that you read them.
- Don't use your In Box as a "to-do list"; it's the electronic equivalent of having piles on your desk. The average person wastes 30 minutes each day looking for old email messages.
- Use folders & subfolders. The rule is never to have more than one screen of email messages in your In Box.
- Spam can come in different forms. Don't open suspected spam email and delete it immediately. If you open spam email, it will tell the sender they've reached a "live" email address.
- Create rules to automatically move your incoming messages into the correct file. This will save time when sorting your messages. Rules can also block unwanted messages.

Tip 4 - Not Delegating Is Not a Choice

One of the most common complaints I hear from managers is, "I try to delegate but when the assignment comes back, it's wrong or it's not good enough. So I end up having to do it myself." When delegated tasks turn out wrong, you must resist the temptation to do it yourself. Doing the work yourself is not good for you or the organization.

Steps for effective delegation:

- Think and plan first
- Clarify the responsibility and results intended
- Select the right person
- Decide on the authority level
- Decide on controls and checkpoints
- Create a motivating environment
- Hold them accountable

With effective delegation, you not only save yourself time, you expand the capability of your team and organization.

Tip 5 - Reclaiming Your Lost Billable Time

Time mastery techniques are especially important for attorneys and other professionals who bill by the hour, as they can help you meet and exceed your billable hour goals.

One common problem I often hear from my clients who need to track their billable time is that they have a great deal of difficulty accounting for their time after the fact. In a perfect world, you'd be able to keep track of each and every thing you do, and make a note of it as you do it. We know, however, that this is not a realistic expectation.

There are many quality software products geared towards helping you track your time as you go. Programs commonly will install a virtual stopwatch on your computer, allowing you to start the stopwatch when you begin a task, and stop it when that task is completed.

Recently, I've uncovered a product named Chrometa that can actually do all of this automatically for you. It logs and categorizes everything you do on your computer as you work, making time and billing reconciliation a snap.

Taking the First Step

These are a few of the many ways you can more effectively manage your time. Now you need to do something with this knowledge and take the first step.

Identify the habit you want to change. The more you know about what, when and why you do something, the easier it

(Continued on page 18)

is to identify habits that are detrimental. When you analyze unwanted behaviors and the situations where they occur, you can pinpoint the precise behaviors you wish to change. You should also examine your assumptions to see if any of them are holding you back from achieving the change you desire.

Begin the new behavior as purposefully as possible. Once you've identified the new habit you want to develop, tell people about it so you're not tempted to fall back into old behaviors. Establish new routines associated with the habit, put up signs to remind you of the new desired behaviors, and do what you can to change your environment so the new habit has a chance to take root and grow.

Try not to deviate from the behavior until the new habit is firmly established. Although you'll often be tempted to do things the old way, resist these temptations. It's tempting to think,

"Just this once won't matter"; but the truth is that every deviation matters a great deal. Every time we deviate, we must start over again. Just think of the number of times people try to lose weight or quit smoking.

Ask other people to help you change. Few of us make significant changes without the support of others. Think carefully about who might be able to help you. How could they best help you? What will you ask them to do? If you build a strong support team around you, new habits are much easier to master.

Time management can help you increase your productivity on the job and at home, help you enhance the quality of your work with less stress, and give you a sense of personal satisfaction and accomplishment. You never know, you might just find the time to reward yourself and do something you have never had the time for! □

Still waiting for your transcript?



Don't wait any longer. We'll get it to you on time.

From your first contact with us, you will experience the fast, friendly, and professional service we are known for. We're fast at answering your call; fast at getting you a court reporter; fast at getting you an accurate transcript and so much more.

Call now to schedule your next deposition!

800-288-3376

ATKINSON-BAKER

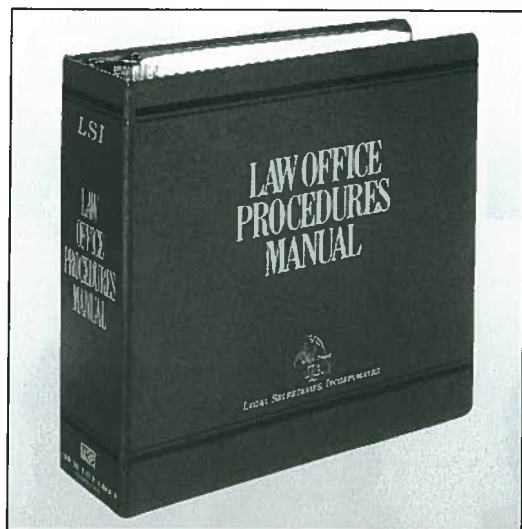
DEPO.COM

NATIONWIDE COURT REPORTERS

LEGAL SECRETARIES, INCORPORATED

LAW OFFICE PROCEDURES MANUAL

... THE *IDEAL TRAINING MANUAL* FOR NEW STAFF!



The Problem

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

The Solution

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

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

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

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

CONTENTS

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

ORDER FORM

Please send me **LAW OFFICE PROCEDURES MANUAL**. If I decide not to keep the book, I will return it within 45 days at my expense.

Also, please enter my subscription to future Updates, which I may cancel at any time.

☐ Do NOT send future Updates. I understand this book has limited value without Updates. (Cost of 188-pg. 2008 Update #2 was \$38.50.)

☐ My payment is enclosed

☐ Please bill me

Legal Secretaries, Incorporated
LAW OFFICE
PROCEDURES MANUAL

Over 1200 Pages

LSI Members-Only Price \$111.20

Nonmembers Price \$139

(Includes shipping)

Subtotal \$

Add applicable sales tax \$

TOTAL \$

NAME _____ PHONE (____) _____

E-MAIL ADDRESS _____ STATE BAR NO. _____

FIRM _____

ADDRESS _____ SUITE _____

CITY _____ STATE _____ ZIP _____

☐ Enclosed is my check for \$_____ payable to **THE RUTTER GROUP**

☐ Charge \$_____ on my ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS

Credit Card Number _____ Exp. Date _____

Signature _____

CONTINUING LEGAL EDUCATION **TRG** PROGRAMS AND PUBLICATIONS

THE RUTTER GROUP™
A DIVISION OF WEST, A THOMSON REUTERS BUSINESS

40530574



2009-2010 LSI Officers

ELECTED OFFICERS



Christa Davis
President



Brooke Atherton, CCLS
Vice President



Sandra T. Jimenez, CCLS
Executive Secretary



Mary Beaudrow, CCLS
Treasurer

APPOINTED OFFICERS



Lorraine Bettencourt, PLS, CCLS
Executive Advisor (CEC)



Kay Bliss, PLS
Parliamentarian



Lugene Borbe, CCLS
Editor-in-Chief



Deborah Rickert, CCLS
Editor, The Legal Secretary

LEGAL SPECIALIZATIONS



Margaret Tovar, CCLS
Coordinator (CEC)



Elizabeth Adame, CCLS
Civil Litigation



Cheryl Kent, PLS, CCLS
Criminal Law



Stephanie Harrison
Family Law

LIAISON TO THE LAW PRACTICE MANAGEMENT AND TECH- NOLOGY SECTION TO THE BAR

LSI CORPORATE OFFICE



Heather Edwards



Catherine Culver, CCLS
Administrator



Jennifer Page
Educational Program
Coordinator (CEC)



Denise Lopes, CCLS
Historian



Jan Vornkahl, CCLS
Law Office Administration



Leslie Ames, CCLS
Probate/Estate Planning



Margaret Tovar, CCLS
Legal Specialization
Sections Coordinator (CEC)



Mae Brooks, CCLS
Transactional Law

ers and Chairpersons



CHAIRMEN



Julie Edsill, CCLS
2010 Annual Conference



Michelle Tice
Advertising



Astrid Watterson, CCLS
California Certified
Legal Secretary (CEC)



Sally Mendez-Arevalo
Career Promotion/
Scholarship



Debra Clark Nejak
Professional Liaison/
Day in Court



Barbara Barregar
Legal Procedure (CEC)



Cindy Illum Jones
Legal Secretary Training
(CEC)



Lorraine Bettencourt, PLS, CCLS
Nominations and Elections

CCLS CERTIFYING BOARD



Robynne Young, CCLS
Chairman



Paula Delp, CCLS
Member



Julie Edsill, CCLS
Member



Michelle Rodgers, CCLS
Member



Debbie Frias, CCLS
Member



Mitchell Driskill, Esq.
Attorney



Marie Bechtel, Esq.
Attorney

PUBLICATION COMMITTEE



Eugene Borba, CCLS
Editor-in-Chief (CEC)



Maria E. Bishop, CCLS
Editor, LSI Legal
Professional's Handbook



Ann Boccia Rosado
Editor, Law Office
Procedures Manual



Lisa De La O
Assistant Editor



Carol Karwatt
Assistant Editor



Karen J. Jones
Assistant Editor



Diane M. Mecca
Assistant Editor



Annie Parrish, CCLS
Assistant Editor

ALL JAZZED UP
 WITH
PLACER COUNTY LEGAL PROFESSIONALS ASSN. and
CAPITOL CITY LEGAL PROFESSIONALS ASSN.
 NOVEMBER 13-15, 2009
 LSI QUARTERLY CONFERENCE
 SACRAMENTO MARRIOTT RANCHO CORDOVA
 RANCHO CORDOVA, CALIFORNIA



CONFERENCE REGISTRATION FORM

NAME (ON BADGE): _____
 MAILING ADDRESS: _____
 CITY/STATE/ZIP: _____
 HOME PHONE: _____ WORK PHONE: _____
 E-MAIL ADDRESS: _____
 LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME)

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE: PLEASE CHECK IF YOU ARE:
☐ STATE OFFICER _____ ☐ GOVERNOR ☐ CCLS ☐ PLS
☐ STATE CHAIRMAN _____

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)

POSTMARKED ON OR BEFORE OCTOBER 14, 2009 \$78.00 \$ _____
 POSTMARKED OCTOBER 15, 2009 OR LATER \$88.00 \$ _____

INDIVIDUAL TICKETS

REGISTRATION BY OCTOBER 14, 2009	_____ @	\$ 8.00	\$ _____
REGISTRATION OCTOBER 15, 2009 OR LATER	_____ @	\$18.00	\$ _____
WELCOME RECEPTION (FRIDAY)	_____ @	\$ 8.00	\$ _____
LUNCHEONS _____ VEGETARIAN			
GOVERNOR'S (SATURDAY)	_____ @	\$29.00	\$ _____
PRESIDENT'S (SATURDAY)	_____ @	\$29.00	\$ _____
MEMBERSHIP (SATURDAY)	_____ @	\$29.00	\$ _____
SATURDAY NIGHT BANQUET	_____ @	\$40.00	\$ _____
_____ CHICKEN MARSALA _____ BAKED SOLE _____ VEGETARIAN CALZONE			
SUNDAY BRUNCH	_____ @	\$28.00	\$ _____
TOTAL AMOUNT ENCLOSED			\$ _____

SPECIAL DIETARY NEEDS: _____

PLEASE MAKE CHECKS PAYABLE TO: PCLPA/CCLPA 11/09 CONFERENCE FUND

MAIL TO: CHERYL EWING
 1513 ZELDA WAY
 SACRAMENTO, CA 95822

FOR GENERAL INFORMATION CONTACT:

REGISTRATION CHAIR – CHERYL EWING (916) 273-1848 – cewing@wkblaw.com
 OR CONFERENCE CO-CHAIR – MICHELLE RODGERS, CCLS, (916) 442-1298 –
mrodgers@lawpolicy.com

NO REFUNDS AFTER OCTOBER 23, 2009

ALL JAZZED UP
WITH
PLACER COUNTY LEGAL PROFESSIONALS ASSN. and
CAPITOL CITY LEGAL PROFESSIONALS ASSN.
NOVEMBER 13-15, 2009
LSI QUARTERLY CONFERENCE
SACRAMENTO MARRIOTT RANCHO CORDOVA
RANCHO CORDOVA, CALIFORNIA



HOTEL REGISTRATION FORM

SACRAMENTO MARRIOTT RANCHO CORDOVA
11211 POINT EAST DRIVE
RANCHO CORDOVA, CA 95742
PH: (916) 638-1100

NAME: _____
MAILING ADDRESS: _____
CITY/STATE/ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
E-MAIL ADDRESS: _____
LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME)
ARRIVAL DATE: _____ DEPARTURE DATE: _____

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES)

☐ SINGLE/DOUBLE - **\$104.00**

PLEASE CALL HOTEL DIRECTLY FOR RESERVATIONS, 916-638-1100. PLEASE IDENTIFY YOURSELF AS
BEING A PART OF LSI IN ORDER TO GET THE GROUP RATE. YOU MAY ALSO RESERVE A ROOM ONLINE
AT

[http://www.marriott.com/hotels/travel/SACMC?groupCode=LEGLEGB&app=resvlink
&fromDate=11/11/09&toDate=11/16/09](http://www.marriott.com/hotels/travel/SACMC?groupCode=LEGLEGB&app=resvlink&fromDate=11/11/09&toDate=11/16/09)

OR ENTER IN THE GROUP CODE "**LEGLEGB**" AND YOUR DATES

FOR GENERAL INFORMATION CONTACT:

REGISTRATION CHAIRMAN: CHERYL EWING, (916) 273-1848, cewing@wkblaw.com or
CONFERENCE CO-CHAIRMAN: MICHELLE RODGERS, CCLS, (916) 442-1298,
mrodgers@lawpolicy.com

HOTEL REGISTRATION DUE BY OCTOBER 22, 2009

Legislative History Tips

Submitted by
Mt. Diablo LPA



Carolina Rose (1976 J.D., Stanford) is co-founder and President of Legislative Research, Inc. (LRI) and is a member of the Mt. Diablo Legal Professionals Association. LRI (established in 1983) specializes in the historical research surrounding the adoption of California codes and regulations. Carolina worked for the California Legislature for 7 years where she was responsible for over 200 measures; provides expert witness consulting in the reconstruction of legislative history; and teaches MCLE seminars on legislative history, related ethical advocacy strategies and regulatory history research.

Legal secretaries and paralegals are sometimes asked to help find the legislative history of a California code section. Legislative Research, Inc.'s website at www.lrihistory.com provides complimentary guidance in this area along with valuable research links. Here is some additional help for the requesting attorney:

The California courts routinely take judicial notice of many types of legislative history records to construe statutes, most commonly to clarify ambiguous terms, but also to reinforce a statute's "plain meaning" – a growing trend.

Controversial records identified by the 3rd DCA. But in *Kaufman & Broad v. Performance Plastering, Inc.* (2005) 133 Cal.App.4th 26, the relevancy of correspondence preserved in unpublished legislative bill files for determining legislative intent was given a big thumbs down by the Third District Court of Appeal (3rd DCA) when such materials were not "communicated to the Legislature as a whole." Unfortunately, the California Supreme Court declined to depublish the decision on December 14, 2005, leading some to wonder if *Kaufman* might have a life beyond its own jurisdiction. (NOTE: Practitioners with 3rd DCA jurisdiction cases should become familiar with all of the *Kaufman* limitations regarding when and how to present legislative history records to that court.) However, at least two cases have undermined the 3rd DCA's limits in this area – one by the California Supreme Court, and the other by the 3rd DCA itself.

"The California courts routinely take judicial notice of many types of legislative history records to construe statutes. . ."

The Supreme Court declines to follow *Kaufman*. In *Sockup v. Law Offices* (2006) 39 Cal.4th 260, the Supreme Court took notice of an "entire legislative history" that included *Kaufman*-banned materials such as "the views of individual legislators or advocates of the legislation rather than the Legislature as a whole." *Id.* n.9. However, it made a point of only relying upon official bill analyses and bill versions to reach its opinion – records it described as "indisputably proper subjects of judicial notice." Here the Court appeared to go out of its way to show that it would make up its own mind about which documents it would rely upon from the

"entire legislative history" in spite of *Kaufman*.

The *Kaufman* court does an about-face one year later. In *Cequell III Communications I, LLC. v. Local Agency Formation Commission* (2007) 149 Cal.App.4th 310, the 3rd DCA departed from its strict *Kaufman* limits when it relied upon a bill analysis by a private party and the accompanying letter sent to the bill's author which had been "located in the files of the Assembly Committee on Local Government." *Id.* at 326.

Moreover, no published decision addresses the 800 pound gorilla in the room: Government Code (Gov. C.) § 9080. This section clearly establishes the relevancy of records found in legislative committee, floor, and partisan caucus bill files – including correspondence – for determining legislative intent, and without regard to whether they were communicated to the "Legislature as a whole." As co-founder and President of Legislative Research, Inc., I was instrumental in the 1996 enactment of § 9080; and I proposed it with the actual legislative enactment process in mind: *There is no such thing as the "Legislature as a whole."* The Legislature functions on a committee basis (review by individual committees and committees of the whole (i.e., the floor of each house)); and each committee level generates potentially relevant legislative history records as recognized in § 9080. The fact that no published opinion has yet relied upon the wide ranging applications of this section qualifies it as a potentially potent sleeping giant for the practitioner.

Practitioners are wise to follow the courts' unofficial playbook when it comes to using controversial, legislative history records: If it helps, use it – especially in light of Gov. C. § 9080.

The 3rd DCA's about-face in *Cequell* reflects a common judicial stance: As in *Sockup*, the courts prefer to rely upon high comfort zone records such as legislative committee analyses and bill versions. But when they don't do the trick, and when a second tier record like correspondence strongly supports a court's preferred outcome, guess what is likely to happen? Practitioners are wise to follow the courts' unofficial playbook when it comes to using controversial, legislative history records: If it helps, use it – especially in light of Gov. C. § 9080. □

¹ Examples of the wide variety of records that the California Supreme Court has relied upon are:

Bill versions: *Quintano v. Mercury Casualty Co.* (1995) 11 Cal.4th 1049 at p. 1062, fn. 5

Legislative Counsel's bill digests: *In re Jesusa V.* (2004) 32 Cal.4th 588, 650

Journals & calendars: *People v. Superior Court (Romero)* (1996) 13 Cal.4th 497, 504, 520, 528

Committee analyses: *Hutnick v. United States Fidelity & Guaranty Co.* (1988) 47 Cal.3d 456, 465, fn. 7

State agency analyses/reports: (Example, FPPC) *People v. Snyder* (2000) 22 Cal.4th 304, 309

Legislative Analyst's fiscal analyses: *People v. Snook* (1997) 16 Cal.4th 1210, 1218

Assembly floor analyses: *Eisner v. Uveges* (2004) 34 Cal.4th 915, 934

Senate partisan caucus analyses: *People v. Snyder* (2000) 22 Cal.4th 304, 310

Senate floor analyses: *Campbell v. Regents of the University of California* (2005) 35 Cal.4th 311, 330

Hearing transcripts: *Lantzy v. Centex Homes* (2003) 31 Cal.4th 363, 377

Enrolled (governor) reports & memos: *Parnell v. Adventist Health System West* (2005) 35 Cal.4th 595, 604-605

Enrolled (governor) correspondence: *California Teachers Assoc. v. San Diego Community College District* (1981) 28 Cal.3d 692, 700

Martin v. Szeto (2004) 32 Cal.4th 445, 450-451

CA Law Rev'n Comm'n Reports: *Mejia v. Reed* (2003) 31 Cal.4th 657, 667

Related bills: *Lantzy v. Centex Homes* (2003) 31 Cal.4th 363, 377

Ballot materials: *People v. Canty* (2004) 32 Cal.4th 1266, 1281

¹¹ Located in Sacramento, California's Court of Appeal, Third Appellate District is one of the three original courts of appeal established by constitutional amendment in 1904. Its jurisdiction stretches over 23 counties: Alpine, Amador, Butte, Calaveras, Colusa, El Dorado, Glenn, Lassen, Modoc, Mono, Nevada, Placer, Plumas, Sacramento, San Joaquin, Shasta, Sierra, Siskiyou, Sutter, Tehama, Trinity, Yolo and Yuba. The geographical area of the District is larger than the combined area of Connecticut, Delaware, New Hampshire, Rhode Island, and Vermont. Practitioners with 3rd DCA jurisdiction cases should become familiar with all of the *Kaufman* limitations set forth regarding the use and presentation of legislative history records before that court.



24-Hour Scheduling

800.697.3210

www.hutchings.com

fax 323.888.6333

email: hutchcal@hutchings.com

**Ask about our
electronic transcript and
hyperlinked exhibit "bundles"**

HUTCHINGSSM COURT REPORTERS

Local - National - International

- ◆ Court Reporters - Conference Rooms
- ◆ Video - Interpreters - Videoconferencing
- ✓ Online Scheduling & Calendar Review
- ✓ Email Transcript Delivery
- ✓ Realtime & Remote Access Services
- ✓ Transcript Archival
- ✓ Imaging & Online Depositories
- ✓ Corporate Administration Programs
- ✓ Case & Document Management
- ✓ CLE Presentations & Training (southern CA only)

Videoconferencing equipment and complimentary food & beverage
service available in all southern California offices.

Family Owned and Operated Since 1953

LAWst in Space!

Submitted by
Humboldt County LPA

Sheryl Brown has been a court reporter for over 30 years, reporting depositions, arbitrations, and hearings. She was co-owner of Brooks & Ojeda in Oakland for 20 years and has owned Brooks & Brown Reporters in Eureka for the last five years. She believes that legal secretaries and paralegals are vital links in providing efficient service to her clients and wanted to be a part of their organization. She served as program chair her first year with HCLPA, was elected to the position of secretary for 2008-2009, then president for 2009-2010. She enjoys cooking, baking, and spending time with her husband, friends and family, especially her three granddaughters and two grandsons.



On Saturday, March 14, 2009, at Harbor Lanes Family Fun Center in Eureka, the Humboldt County Legal Professionals Association participated in Galaxy Bowl for Kids' Sake 2009 to benefit North Coast Big Brothers Big Sisters. It is their biggest yearly fundraiser during which time they raise most of their annual operating costs. Many North Coast children benefit from having a mentor through North Coast Big Brothers Big Sisters. Representing our Association were nine bowlers, consisting of six HCLPA members, three willing relatives, and a photographer.

Following the space theme this year, our team submitted to each other and voted on several very clever names. Kelly Borges submitted the winning name, LAWst in Space. Our sub-theme, the '60s television series "Lost in Space," took on a life of its own! Our team consisted of our president, Kathy (Dr. Maureen Robinson) Parker; our secretary and bowling captain, Sheryl (Dr. Zachary Smith) Brown; our vice president and LSI Historian, Denise (Will Robinson) Lopes, CCLS; and HCLPA members Lesa (Major Don West)

Myers, Kathryn (Penny Robinson) Redl-Niebel, and Kelly (Judy Robinson) Borges, who doubled as our photographer. Completing our team was Kathy's husband, Family Law Mediator and part-time Trinidad Police Department Sergeant Dennis (Dr. John Robinson) Parker, and bowling along with us was Kelly's husband, Mike, Sheryl's husband, Dan; and Lesa's son, Ian. The Lost in Space robot, B-9, was also represented by pictures we waved around whenever Denise bowled, while we shouted "Danger, Will Robinson, danger!!"

Our clever costumes were beautifully made by Kathryn Redl-Niebel, who spared no attention to detail. It was no surprise to us that the costumes won first prize for our bowling time slot. Thanks to Kathryn's creativity, we received a prize of a bowling pin transformed into a spaceship.

Our team members worked hard and raised \$1,335 in pledges. Everyone had a great time, even Denise whose ball was "Lost in Space" several times! We were proud to represent HCLPA and participate in such a wonderful community event. □

California Certified Legal Secretary

A Program of
Legal Secretaries, Incorporated



APPLICATION

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

CCLS Certifying Board
5726 Lorelei Avenue
Lakewood, CA 90712

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, March 21, 2009
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 17, 2009

Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$25 late fee, in addition to the fees listed below, if space is available.

EXAMINATION FEES*			
	LSI MEMBERS**		Non-LSI MEMBERS
	Registration fee: \$ 15.00		Registration fee: \$ 55.00
	Examination fee: <u>\$ 95.00</u>		Examination fee: <u>\$ 95.00</u>
	Total \$110.00		Total \$150.00

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

* Fees subject to change without notice.

** LSI members: Name of local association: _____ LSA/LPA.
Please enclose a photocopy of your local membership card.
You must be a member upon application to be eligible for reduced fees.

*** Include \$25 late fee if applicable.

Name _____ Last 4 Digits of SSN _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____

E-mail(s): _____

Highest level of formal education completed: _____; Highest Degree: _____.

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

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

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

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

Signature of Applicant _____ Date _____

Spreading The News About My First Conference

Submitted by
San Diego LSA



Attend or not attend? This is a question that many legal secretaries and legal professionals ask themselves about the conferences and seminars that they are invited to attend. Some may attend because of their position at work or because of their membership with a professional organization, or some may make the decision to attend by the persuasion of a friend, co-worker, or employer. Then there are those that are just curious. For me, I decided to go and reap the benefits of attending a conference where I can learn new things about the legal profession, participate in network opportunities, and cultivate new friendships that are created at conferences. I committed myself to going to LSI's Annual 75th Conference, and even happily accepted the nomination of Delegate for the San Diego Legal Secretaries Association.

The icing on the cake came when I found out that I had passed the CCLS exam in March! LSI's Annual Conference is the big stage to be honored and recognized for accomplishing such a feat! So, there was no turning back. . . I was on my way to conference to represent the San Diego Legal Secretaries Association as a Delegate and to be recognized and honored as a California Certified Legal Secretary. Up the freeway to Long Beach I went!

This was my first experience attending a conference on a professional level. There was history, tradition, and a bit of formality. There was also plenty of room for fun and laughter, smiles and tears, high-fives, applause, hugs, and even a couple of entertaining attorney jokes. I met

other first-time attendees at the "Newcomers' Workshop," including meeting several people from my home town in Burbank, California, where I went to school and started my career as a legal secretary. (I even crossed paths with another fellow legal secretary who happened to be from Burbank and who knew my sister-in-law and niece quiet well. What a small world!) Later that day at the "Newcomers Luncheon," a woman sitting at my table introduced herself from the Beverly Hills/Century City Association. She shared a couple of stories about how difficult it was to find some of the Hollywood celebrities for process service. She shared another story about how it took her boss 6 pages of deposition testimony for one renowned musician just to state his real name for the record. Boy, does she have an interesting job!

One of my favorite moments was attending the coveted "CCLS Luncheon." I was one of 20 individuals statewide who passed the CCLS exam this past year. One by one, we were called to the front of the room to receive a corsage. Wow, what a feeling to hear my name announced followed by the initials, "C-C-L-S!" We each shared a little bit about our challenges and tribulations along the way, filled with lots of laughter and a few heartfelt tears. San Diego LSA was the largest contingent at the conference and was well heard by their thunderous applause and cheers. Thank you to all for your support and encouragement!

Besides the workshops, business meetings, luncheons, banquet and brunch, there was time to meet and chat with the vendors, both professional and retail ... the purses and jewelry were a

Anita Kranzberg joined Klinedinst PC in San Diego in 2008, bringing with her over 20 years experience as a legal secretary. A native Southern Californian, Anita was born and raised in Burbank, California and relocated to San Diego in 1997 with her husband and three daughters.

Anita has been a member of the San Diego Legal Secretaries Association for the past 3 years, and recently passed the CCLS exam. She is the current Database and Roster Chairperson for the SDLSA, and has signed on as a regular staff writer for the SDLSA's monthly publication, "Legalines."

Besides cheering on the Padres and Chargers, Anita enjoys music, camping, scrapbooking, Jazzercise, and casual event planning, including her annual neighborhood "Chili Cook-Off"!

(Continued on page 30)

Spreading The News About My First Conference (Continued from page 29)

big hit. I even had an opportunity to relax with the San Diego group and get to know my peers better. It was really nice to take a break from the family and home responsibilities and to unwind a little bit. I even had a chance to visit the Long Beach Aquarium of the Pacific, take a walk to "The Pike," and even stayed up late to watch a Saturday Night Live segment! When you can mix relaxation with business, you know you've had a successful conference.

I want to make special note of the great job that our Governor, Cori Mandy, did in getting us to the right place at the right time, and making sure we were taken care of. She was fabulous! In addition to Cori, I wanted to again express my gratitude to all who attended from San Diego and made my first experience at conference a memorable one. In particular, for supporting me during the special CCLS recognition

moments — they cheered so loud that at one point, the CCLS Chairman, Joan Layte, instructed the audience to get ready to plug their ears. So, a big thank you to Michelle Tice, Annie Parrish, Leanna Pierce, Linda Moore, Clariece Tally (and her chaperone, Mark), Belinda Owens, Marge Berglund, Robynne Young, Terrie Quinton, Sparrow Daenitz, and my roommate, Teresa Kleeberger. I had a wonderful time!

In closing, I would recommend that you make plans to attend next year's annual conference, or at least, attend one of the quarterly conferences held throughout the year. You'll reap many rewards when you attend conferences: you'll make new friends; you'll network with others; you'll receive valuable education and information; and you'll have an overall enjoyable and gratifying experience. I sure did. □



El Dorado County Legal Professionals Association Annual Crab Blast and Auction

Submitted by
El Dorado LPA



Dana Carlson is the Vice President, Bulletin Editor, Employment and Membership Chair for El Dorado County Legal Professionals Association. She has worked for the law firm of Zitomer & Roberts, P.C. since March 2000 as a legal secretary, working her way to a paralegal status shortly thereafter. She is an associate member of the El Dorado County Bar Association and lives in Cameron Park, California with her husband and 3 boys who all enjoy camping, fishing, and sports.

This was our 5th Annual Crab Blast and Auction for EDCLPA and by far the most successful! We sold approximately 150 tickets, meeting our goal of 150 (deciding to downscale for comfort this year!) Our former President Leslie Squire was unfortunately unable to attend due to illness and our Program Chair (and incoming President) Sandra Nerwinski opened the festivities by welcoming everyone for a promised night of great food, great entertainment and the enjoyment of family and friends, new and old. The event was held at the Diamond Springs Fireman's Hall on March 7 from 6-10 p.m. We had the place filling up at 5:30 and knew then that it promised to be a very successful evening.

Our officers and volunteers began setting up on Saturday morning at 8:00 a.m. and it was exciting placing tables, decorating (in the St. Patrick's theme this year), and bouncing ideas off each other as the day progressed. Our master chef (and beloved Governor Schuyler Bayless) soon began cooking and the hall was quickly filled with the smell of garlic, onions, and olive oil being sautéed for our special spaghetti sauce! We all looked like giant worker ants running from one end of the hall to the other over and over again until everything was perfect and ready for the night!

Once everyone got settled in, grabbed a beverage and mingled a bit, they all started in on the salad and rolls while the wonderful spaghetti was brought out for everyone to fill their plates. Soon after the king crab was provided to each table and because of our wonderful volunteer servers, there was never an empty platter. Dessert was next with a variety of cookies, cakes, and sweet breads!

The band Elderado, which included local attorney Dave Becker, was quite a production and drew a lot of attention and definitely helped our ticket sales. Once the music started, there was no stopping the crowd from dancing. There is no doubt that this event held the liveliest group yet!

Our Auction included a weekend stay at a river front cabin at the American River Resort in Coloma, a professional studio portrait session including a 16x20 photo from Fiorillo Studio in Placerville, a weekend getaway in Half Moon Bay, a roundtrip ticket for 2 on a train ride to Truckee which included a lunch, (2) 4-week saber lessons from Hangtown Saber Club, a beautiful framed picture by local artist Connie Randmaa, 2 night getaway in South Lake Tahoe at the American Vacation Club, and (2) 1-day lift tickets at Deer Valley Resort. Along with the auction we had over 60 donated items to win, such as salon gift certificates (for hair and nails), dinner for two at two fabulous restaurants at the new Redhawk Casino (Pearl and Henry's), movie tickets, jewelry, wine, wine, and more wine, a tanning salon gift certificate, oil changes, the list goes on. Most importantly, a portion of our proceeds will be donated to the El Dorado County Bar Association Scholarship Fund which helps high schools kids from Lake Tahoe all the way to El Dorado Hills!

Overall it was wonderful to see our group work together and to know that at the end of the night when all that was left were tired members, dirty tables, dishes to wash, and things to pack up for next year, this event was not only successful but welcomed by our community. We all left exhausted but with a smile on our faces! □

A Student's Perspective

Submitted by
Imperial County LPA

I am not a lawyer. I am not a legal secretary. I am not a certified legal assistant and I don't have a degree or certification of any kind. Who am I, then, and why have my words been printed on this page?

My name is Fabianna Perez. For almost a year now, I have been a student employee with Walker & Driskill, PLC, in El Centro, California. I decided to take a leave of absence from my undergraduate studies in January 2008, with the intent to explore my graduate school options and to confirm a goal I have considered all along: becoming a lawyer. Luckily, I was soon given an opportunity to do just that, by learning firsthand about the law in a *real law office*.

My interest in the U.S. justice system began early during my high school years, when I participated in our school's mock trial program. At first an attempt to shed my timidity, my involvement soon escalated to include reciting closing arguments and cross-examining quick-witted witnesses. It wasn't long before I found myself completely enthralled with the world of law and policy; with how it is applied, argued, and how it can be compromised.

Since entering college, my intellectual curiosity has taken me everywhere from art history to human biology. It has all been interesting to learn and honestly, I can see myself revisiting every one of those subjects in the future. However, I have never been able to shake the enduring appeal of legal advocacy. In observing the legal process from my position at Walker & Driskill, I have happily learned a most important lesson: practicing law

means the possibility of continuous education in multiple concentrations. In one year, I have had the opportunity to observe and learn about juvenile law, employment law, government law, land use, construction disputes, contract disputes, criminal matters, and more.

There is something to be said about experiencing a profession from the inside, and more importantly, alongside a staff that keeps the firm running smoothly. Having three attorneys and two legal secretaries to learn from has been an amazing opportunity, as every professional with whom I work possesses a specific manner of productivity and a legal strength. Would I understand the demands of office management had I not seen it firsthand this year? Would I appreciate the organization efforts that go into preparing for trial? Would I value the support that comes from one professional to another, in providing a service to clientele?

I have learned the finer art of Westlaw researching. I have learned the fragile nature of maintaining client relationships. I have learned the disappointment of losing a case, I have felt the drawbacks of personal investment, and I have struggled through the realization that justice does not always prevail. Most importantly, I have had to learn to be okay with that.

Ultimately, this year has taught me many important lessons, the most important being passion for upholding the law. I will return to campus in the spring, with renewed curiosity, hope, and dedication to public service. And guess what? I still plan on being a lawyer. □



Fabianna Perez is an undergraduate student at Stanford University pursuing a degree in Psychology and contemplating a minor in Creative Writing. She hopes to one day become a legal advocate in the public service sector and intends to continue writing, always.

LEGAL SECRETARIES INCORPORATED (LSI) BENEFITS

INSURANCE & FINANCIAL SERVICES INCLUDING AUTO & HOMEOWNERS DISCOUNTED INSURANCE; HEALTH/RETIREMENT/DENTAL PLANS/DISCOUNTED LONG TERM CARE INSURANCE

NOTE: This list is maintained for use by members of Legal Secretaries, 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. LSI wants its members to find the BEST coverage for each member's individual needs and location. For information call these representatives directly.

DISCOUNT THROUGH CEB

Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, refer to <http://ceb.com/LSI/>

STEVEN C. DANNENBERG, AFLAC Agent
11091 Rhyolite Drive, Suite 4
Redding, California 96003
Direct: (530) 339-5889 – Office (530) 243-9879
Fax: (530) 243-9880

Portfolio: Accident, Sickness, Cancer, Dental,
Hospital Indemnity & Heart Attack/Stroke
- Firms with 3 or more W-2 employees qualify for
§125 / Cafeteria Plans & additional policies.

WORKING ADVANTAGE

Toll Free: 1 (800) 565-3712
www.workingadvantage.com
Discount on event tickets
movie tickets; theme parks; Broadway theatre;
sporting events; ski tickets; hotel certificates;
family events; gift cards & more

DWORKIN INSURANCE SERVICES EARL DWORKIN

467 Hamilton Avenue, Suite #1
Palo Alto, California 94301
Phone: (650) 329-1330 **(800) 332-4313** – Fax (650)
329-9957
Individual and Family Medical
Insurance; Travel Medical; Medicare
Supplements; Dental Plans

CAPITAL INVESTMENT ADVISERS EMERSON J. FERSCH, CFP, ChFC

5000 E. Spring Avenue, Suite 200
Long Beach, California 90815
Phone: (562) 420-9009 **(877) 270-9342**
Fax (562) 438-2640
Comprehensive Financial Planning, Asset
Allocation and Investment Management,
Long Term Care Insurance and Planning

FINANCIAL NETWORK INVESTMENT DANIEL R. HENDERSON, MBA, CFP

3478 Buskirk Avenue, Suite 300
Pleasant Hill, California 94523
Phone: (925) 944-9644 Ext. 153
(800) 339-4353 Ext. 153
Fax (925) 944-5675
Discounted JOHN HANCOCK Long Term Care
Insurance/Life Insurance, Annuities, Retirement,
Investment/Estate Planning, Mutual Funds, 401k

CREDIT UNIONS

**LA FINANCIAL
FEDERAL CREDIT UNION**
Post Office Box 6015
Pasadena, California 91102-6015
Phone: **(800) 894-1200**

PROVIDENT CENTRAL CREDIT UNION
303 Twin Dolphin Drive
Post Office Box 8007
Redwood City, California 94603-0907
Phone: **(800) 632-4699** – (650) 508-0300

ADDITIONAL PROVIDERS

HERTZ CORPORATION

Effective Date: June 1, 1996

CDP Card #447698

Phone (800) 654-3131

Or Your Travel Agent

QUESTIONS AND CONCERNS CONTACT

Brooke Atherton, CCLS, LSI® Marketing Committee Coordinator
7448 Skyway, Paradise, California 95969
Work - (530) 877-6332 -- Fax (530) 877-7054
paralegalbam@sbcglobal.net

A Message From The Editor

Editor,
The Legal Secretary



Deborah Rickert, CCLS is editor of The Legal Secretary magazine. She has served LSI as LSS Civil Litigation Leader, PRC Assistant Editor, Registrar, and Editor of The Legal Secretary 2004-2006. She is currently serving as Parliamentarian of Orange County LSA. Deborah has been a legal secretary for over 25 years, and works at Latham and Watkins LLP in Orange County, California.

I am continuing as Editor of *The Legal Secretary* magazine and with your help, we can make the magazine contain many interesting articles which include photographs. My goal is to continue working to have your magazines received by you before each conference.

I would like to thank each association, LSI member and chairperson who contributed to *The Legal Secretary* this past year and more than ever thank those who included photographs. The content of last year's magazines were enjoyed by all.

As announced at the Post Governors meeting, each association is assigned to submit both a governor and guest writer article for one issue during the fiscal year. If your association is assigned for a particular quarter, please do your best to contribute these articles. If your association has a special event, please share it with all of us by submitting an article and photographs to be included in an upcoming issue. Keep in

mind that guidelines have been set to ensure this magazine maintains its integrity and professionalism. Those guidelines were distributed at the Post Annual Governors meeting at Annual Conference and will be available online soon. Don't forget for each *printed* article submitted by a guest writer, an association earns 100 Chapter Achievement Points. For each *printed* article by a governor, an association earns 50 Chapter Achievement Points.

The associations assigned for the November issue of *The Legal Secretary* are:

Imperial County, Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Monterey County, Mt. Diablo, Napa County, Orange County and Palo Alto.

Submissions are to be received no later than September 1st and are happily accepted prior to this deadline. In addition to your articles, I also need to receive a photograph of the author, short biography and a completed Checklist. □



Guidelines For Submission Of Articles To The Legal Secretary

Guest Writer Guidelines

COMPUTER INPUT GUIDELINES

1. Submit articles on CD or 3.5 diskette, and via email using word processing programs such as Microsoft Word or WordPerfect. Articles sent in PDF format are not acceptable.
2. Write on your CD or disc article title, author name and name of submitting association.
3. Type all copy in 12-point type to fit across an 8½" x 11" page. Do not use the space bar for centering or tabs.
4. After you have typed all copy, save as "doc," "txt," "wpd" or "ASCII" file.
5. Save the article you type on your hard drive (memory) until the magazine is printed.
6. Send a hard copy of your article, laser output preferred. Do not fold hard copy.
7. Include Article Submission Checklist with each article sent for publication.

PHOTOGRAPHS

When an article is submitted by governor, a guest writer or member of a governor's local association, a photograph and brief biography of the governor, guest writer or member must be submitted as part of the article. Print name, article title and name of submitting association on the reverse of the photograph submitted to the magazine editor. Passport photos preferred.

MISCELLANEOUS

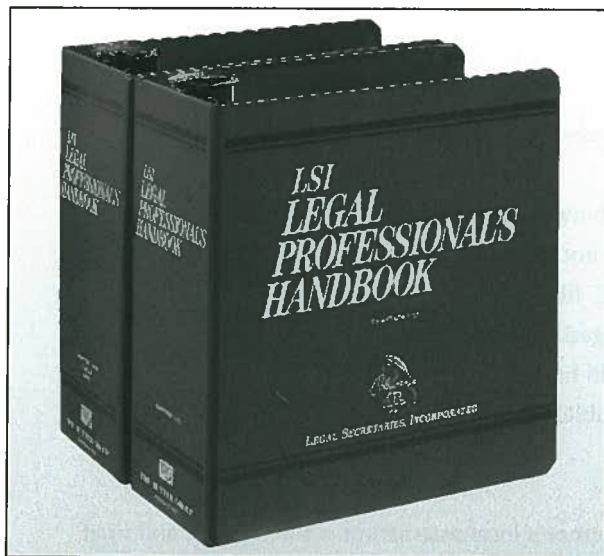
1. Articles submitted must include Article Submission Checklist.
2. Articles are subject to approval and/or editing.
3. Articles submitted and published in The Legal Secretary become property of LSI.
4. Articles and biographies may be submitted by email. Biography and photo should be included with the email.
5. Hard copy, CD or diskette and photograph must follow by U.S. mail or other carrier. Articles should be saved as "doc," "txt," "wpd" or "ASCII" file. Write on disc the article title, author name and name of submitting association.
6. Submitted photos will be returned upon request only. A self-addressed, stamped envelope must be included with your written request. Print name, article title and name of submitting association on the reverse of photograph. Passport photos preferred.
7. All articles submitted must be at least 500 words but no more than 2,500 words.
8. All UPS/FedEx packages should be addressed to:

Deborah Rickert, CCLS
c/o LATHAM & WATKINS LLP
650 Town Center Drive, Suite 2000
Costa Mesa, CA 92626-1925

LEGAL SECRETARIES, INCORPORATED

LEGAL PROFESSIONAL'S HANDBOOK

... THE ULTIMATE RESOURCE GUIDE!



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

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

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

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

CONTENTS

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

ORDER FORM

Please send me LEGAL PROFESSIONAL'S HANDBOOK. If I decide not to keep the book, I will return it within 45 days at my expense.

Also, please enter my subscription to future Updates, which I may cancel at any time.

☐ Do NOT send future Updates. I understand this book has limited value without Updates. (Cost of 1,312-pg. 2008 Update was \$112.)

☐ My payment is enclosed

☐ Please bill me

Legal Secretaries, Incorporated LEGAL PROFESSIONAL'S HANDBOOK

2 Volumes • Over 2550 Pages

LSI Members-Only Price \$204

Nonmembers Price \$255

(Includes shipping)

Subtotal \$

Add applicable sales tax \$

TOTAL \$

NAME _____ PHONE (____) _____

E-MAIL ADDRESS _____ STATE BAR NO. _____

FIRM _____

ADDRESS _____ SUITE _____

CITY _____ STATE _____ ZIP _____

☐ Enclosed is my check for \$ _____ payable to **THE RUTTER GROUP**

☐ Charge \$ _____ on my ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS

Credit Card Number _____ Exp. Date _____

Signature _____

CONTINUING LEGAL EDUCATION



PROGRAMS AND PUBLICATIONS

THE RUTTER GROUP™

A DIVISION OF WEST, A THOMSON REUTERS BUSINESS

40272000

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)	\$ 5.00		\$
CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET Currently under revision and not available at this time			
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)	N/C		
CCLS MOCK EXAM (Revised 2009) Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	20.00		
CCLS PIN A ½" high, 10-karat gold pin with CCLS logo. For the CCLS.	35.00		
CCLS STUDY KIT Contains Mock Exam (see above), Gregg Reference Manual with Basic and Comprehensive Worksheets and Instructor's Resource Manual.	120.00		
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 2/08)	N/C		
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES* A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 11/05)	5.00		
HISTORY OF LEGAL SECRETARIES, INCORPORATED A 50-page memory of people, places and events since 1929. (Rev. 2/08)	5.00		
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.			
TEACHER TRAINING CHAPTER (Rev. 9/07)	4.00		
ADOPTIONS CHAPTER (Rev. 9/07)	7.00		
CIVIL PROCEDURE CHAPTER (Rev. 9/07)	7.00		
CONSERVATORSHIP CHAPTER (Rev. 9/07)	7.00		
CORPORATIONS CHAPTER (Rev. 9/07)	7.00		
COURT STRUCTURE CHAPTER (Rev. 9/07)	7.00		
CRIMINAL LAW CHAPTER (Rev. 9/07)	7.00		
DISCOVERY CHAPTER (Rev. 9/07)	7.00		
FAMILY LAW CHAPTER (Rev. 9/07)	7.00		
PROBATE CHAPTER (Rev. 9/07)	7.00		
REAL ESTATE CHAPTER (Rev. 9/07)	7.00		
UNLAWFUL DETAINER CHAPTER (Rev. 9/07)	7.00		
WORKERS' COMPENSATION CHAPTER (Rev. 9/07)	7.00		
MISCELLANEOUS CHAPTER (Rev. 9/07)	7.00		
LEGAL SECRETARY'S REFERENCE GUIDE A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 4/07)	30.00		
LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI Governors.	5.00		
TOTAL THIS PAGE			\$

*Item available to LSI members only.

(Prices effective 5/1/09)

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)	\$ N/C		
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP PIN* (Magnetic) A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	5.00		
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
MEMBERSHIP APPLICATION FORM* An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information. (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
PRESIDENT'S PENDANT* A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
PRESIDENT'S PIN* Same as pendant (see above), but with pin on back.	7.00		
TOTAL THIS PAGE			\$
TOTAL PREVIOUS PAGE +			\$
TOTAL ORDER =			\$
MAILING/SHIPPING AND HANDLING (15% OF TOTAL ORDER) +			\$
SUB-TOTAL, INCLUDING MAILING/SHIPPING AND HANDLING =			\$
CALIFORNIA SALES TAX (8.25% OF SUB-TOTAL ABOVE) +			\$
TOTAL DUE =			\$

PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL IMMEDIATE REQUIREMENTS. COMPLETE PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO LEGAL SECRETARIES, INCORPORATED, CORPORATE OFFICE, P. O. BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (707) 725-1344. CHECK OR CREDIT CARD INFORMATION MUST BE INCLUDED. ORDER WILL BE MAILED OR SHIPPED WITHIN 10 DAYS OF RECEIPT, SUBJECT TO AVAILABILITY.

DELIVER TO: NAME _____ ASSOCIATION _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DAY TELEPHONE (_____) _____ E-MAIL _____

Method of Payment: Check, payable to "LSI," enclosed ☐ VISA ☐ MASTERCARD ☐

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

Name on Credit Card: _____ **Card Verification Number** _____

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

*Item available to LSI members only.

(Prices effective 5/1/09)

WEBSITES

<http://www.fasb.org>
Financial Accounting Standards Board

<http://www.nw3c.org/>
National White Collar Crime Center

<http://www.uscis.gov>
U.S. Citizen and Immigration Services

<http://www.knowledgemosaic.com>
Securities Mosaic

<http://ip.law360.com/>
Intellectual Property Law

<http://www.statemaster.com>
Statistics

<http://www.bls.gov/cpi/>
Consumer Price Index

ADVERTISERS INDEX

Atkinson Baker.....	18
Stuart F. Cooper Co.....	IFC
Hutchings Court Reporters.....	25
Janney & Janney Attorney Service, Inc.....	Back Cover
LSI's TLSRG.....	IBC
Peterson Reporting.....	12
The Rutter Group.....	19, 36

DATES TO REMEMBER 2009

August 10, 2009	Deadline to sign up for Legal Specialization Section Workshops
August 14-16, 2009	First Quarterly Conference Hosted by Desert Palm LPA Palm Springs Hilton, Palm Springs, California
August 18, 2009	Last day to register for CCLS October 17th Exam without a late fee
September 1, 2009	Deadline for submission of articles to <i>The Legal Secretary</i>
September 17, 2009	Last day to register for CCLS Exam with payment of late fee
October 14, 2009	Last day to register for November conference and receive early registration discount
October 17, 2009	California Certified Legal Secretary (CCLS) Examination Northern and Southern California locations
October 22, 2009	Last day to make hotel reservations for November conference
November 12-15, 2009	Second Quarterly Conference Hosted by Capitol City LPA/Placer County LPA Marriott Sacramento, Sacramento, California
December 1, 2009	Deadline for submission of articles to <i>The Legal Secretary</i>



2009-2010 LSI Roster



ELECTED OFFICERS

President

CHRISTA DAVIS
Home: (510) 582-1641; Office: (925) 463-0750
Fax: (925) 463-0407
E-mail: cdavis@staleyjobson.com

Vice President

BRooke ATHERTON, CCLS
Home: (530) 872-1074; Office: (530) 877-6332
Fax: (530) 877-7054
E-mail: paralegalbam@sbcglobal.net

Executive Secretary

SANDRA T. JIMENEZ, CCLS
Home: (760) 353-8736; Office: (760) 352-5421
Fax: (760) 352-5422
E-mail: sjimenez52@yahoo.com

Treasurer

MARY BEAUDROW, CCLS
Cellular: (415) 717-5675; Office: (415) 268-7281
Fax: (415) 268-6412
E-mail: marybeau@comcast.net

APPOINTED OFFICERS

Executive Advisor (CEC)

LORRAINE BETTENCOURT, PLS, CCLS
Home: (209) 356-0815; Office: (209) 384-7887
Fax: (209) 384-5865
E-mail: plsccs@aol.com

Parliamentarian (CEC)

KAY BLISS, CCLS
Home: (951) 689-3306; Office: (951) 826-8265
Fax: (951) 686-3083
E-mail: kay.bliss@bbkllaw.com

Editor-In-Chief (CEC)

LUGENE BORBA, CCLS
Home: (209) 852-2790; Office: (209) 576-7777
Fax: (209) 576-7139
E-mail: luccls@hughes.net

Editor, The Legal Secretary

DEBORAH RICKERT, CCLS
Home: (714) 847-4499; Office: (714) 755-8132
Fax: (714) 755-8290
E-mail: deborah.rickert@lw.com

Educational Program Coordinator (CEC)

JENNIFER L. PAGE
Home: (415) 898-1010; Office: (415) 721-2040
Fax: Please call first
E-mail: jlpage@ix.netcom.com

Historian

DENISE LOPES, CCLS
Home: (707) 677-0747; Office: (707) 442-2927
Fax: (707) 443-2747
E-mail: denisesaboo@yahoo.com

Legal Specialization Sections Coordinator (CEC)

MARGARET TOVAR, CCLS
Home: (562) 699-2006; Office: (213) 452-0115
Fax: (213) 625-0931
E-mail: mtovar@kblaw.com

CHAIRMEN

2010 Annual Conference

JULIE EDSILL, CCLS
Home: (530) 892-1249; Office: (530) 893-0717
Fax: (530) 893-9236
E-mail: juleeone@sbcglobal.net

Advertising

MICHELLE TICE
Home: (619) 579-0654; Office: (858) 523-6260
E-mail: SDLSAprez@gmail.com

California Certified Legal Secretary (CEC)

ASTRID WATTERSON, CCLS
Home: (916) 982-1900; Office: (916) 446-7979
Fax: (916) 446-8199
E-mail: awatterson@somachlaw.com

Career Promotion/Scholarship

SALLY MENDEZ-AREVALO
Home: (707) 648-9266; Office: (415) 421-7151
Fax: (415) 362-8064
E-mail: smendez@alshulerberzon.com

Editor, LSI Legal Professional's Handbook

MARIA E. BISHOP, CCLS
Home: (925) 283-5226; Office: (925) 284-7788
Fax: (925) 284-7789
E-mail: mbishopccls@hotmail.com

Editor, Law Office Procedures Manual

ANNA BOCCIA ROSADO
Home: (310) 833-9952; Fax: (562) 435-8304
Office: (562) 435-8300 x229
E-mail: arosado@skes-law.com

Legal Procedure (CEC)

BARBARA BARREGAR
Office: (714) 641-5100 x1357
E-mail: bbarregar@rutan.com

Legal Secretarial Training/Seminars (CEC)

CINDY ILLUM JONES
Home: (209) 368-3661; Office: (209) 943-3950 x2
Fax: (209) 943-3505
E-mail: cindy@quinnlaw.net

Professional Liaison/Day in Court

DEBRA CLARK NEJAK
Cell: (209) 743-5975; Office: (209) 369-9255
Fax: (209) 369-9288
E-mail: debranejak@yahoo.com

LEGAL SPECIALIZATION SECTIONS

Coordinator

MARGARET TOVAR, CCLS
Home: (562) 699-2006; Office: (213) 452-0115
Fax: (213) 625-0931
E-mail: mtovar@kblaw.com

Civil Litigation

ELIZABETH ADAME, CCLS
Home: (760) 352-8333; Office: (760) 352-4001
Fax: (760) 352-5561
E-mail: liz.adame@sbcglobal.net

Criminal Law

CHERYL KENT, PLS, CCLS
Home: (925) 463-3440; Office: (925) 837-0585
Fax: (925) 463-3400; (925) 838-5985
E-mail: clk@gagemccoy.com; 2catlovers@comcast.net

Family Law

STEPHANIE HARRISON
Home: (209) 723-4479; Office: (209) 384-0123
E-mail: stephmjb@sbcglobal.net

Law Office Administration

JAN VORNAHL, CCLS
Home: (510) 790-8337; Cellular: (510) 493-6636
E-mail: jnstitches@sbcglobal.net

Probate/Estate Planning

LESLIE AMES, CCLS
Home: (707) 442-0500
E-mail: eurekalaw@aol.com

Transactional Law

MAE BROOKS, CCLS
Home: (805) 642-6478; Cellular: (805) 659-6800
Fax: (805) 659-6818
E-mail: mbrooks@fcoplaw.com

PUBLICATIONS REVISION COMMITTEE

Editor-In-Chief

LUGENE BORBA, CCLS
Home: (209) 852-2790; Office: (209) 576-7777
Fax: (209) 576-7139
E-mail: luccls@hughes.net

Editor, LSI Legal Professional's Handbook

MARIA BISHOP, CCLS
Home: (925) 283-5226; Office: (925) 284-7788
Fax: (925) 284-7789
E-mail: mbishopccls@hotmail.com

Editor, Law Office Procedures Manual

ANNA BOCCIA ROSADO
Home: (310) 833-9952; Fax: (562) 435-8304
Office: (562) 435-8300 x229
E-mail: arosado@skes-law.com

Assistant Editor

LISA DE LA O
Home: (818) 787-3979; Office: (818) 784-8700
Fax: (818) 784-5406
E-mail: lisad@ssmlaw.com

Assistant Editor

KAREN JONES
Home: (818) 360-5366; Office: (310) 284-5695
Fax: (310) 557-2193
E-mail: karenjacobjones@aol.com; kjones@proskauer.com

Assistant Editor

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

Assistant Editor

DIANE M. MECCA
Home: (209) 529-3101; Office: (209) 238-0946 x210
Fax: (209) 238-0953
E-mail: diane@friendandwalton.com; ks24fanatic@aol.com

Assistant Editor

ANNIE PARRISH, CCLS
Cell: (619) 322-5066; Office: (619) 744-7312
Fax: (619) 230-0987
E-mail: annie.parrish@gmail.com

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

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

CCLS CERTIFYING BOARD

Chairman

ROBYNNE YOUNG, CCLS

Members

PAULA DELP, CCLS
JULIE EDSILL, CCLS
DEBBIE FRIAS, CCLS
MICHELLE RODGERS, CCLS

Attorneys/Educators

MITCHELL DRISKILL, ESQ.
MARIE BECHTEL, ESQ.

LSI CORPORATE OFFICE

Administrator

CATHERINE CULVER, CCLS
Home: (707) 725-1344; Office: (800) 281-2188
Fax: (800) 281-2188
E-mail: lsior@suendenlinkmail.com

LSI Website: <http://www.lsi.org>

LEGAL SECRETARIES, INCORPORATED

Presents:

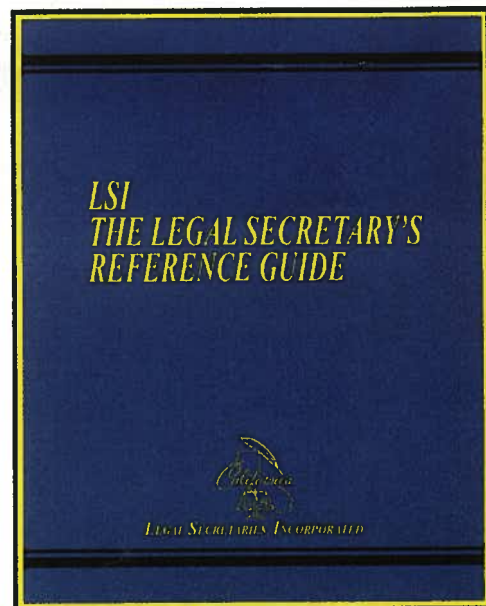
The Legal Secretary's Reference Guide

The perfect desk reference for beginning and experienced legal professionals – convenient and easy to use.

No legal professional should be without one!

The guide includes:

- Grammar and punctuation tips, document control and filing tips
- Legal terminology
- Legal research tips/proper usage of citations
- Timetables in civil litigation, discovery, and statutes
- Flowcharts in civil litigation, discovery, criminal, family law, conservatorships, probate, adoptions, corporations, unlawful detainer, and workers compensation



Order your copy of The Legal Secretary's Reference Guide today!

ORDER FORM:

**\$37 - INCLUDES TAX AND
SHIPPING & HANDLING**

NAME _____ NUMBER OF COPIES _____

E-MAIL ADDRESS _____ PHONE (_____) _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____



LEGAL SECRETARIES, INCORPORATED

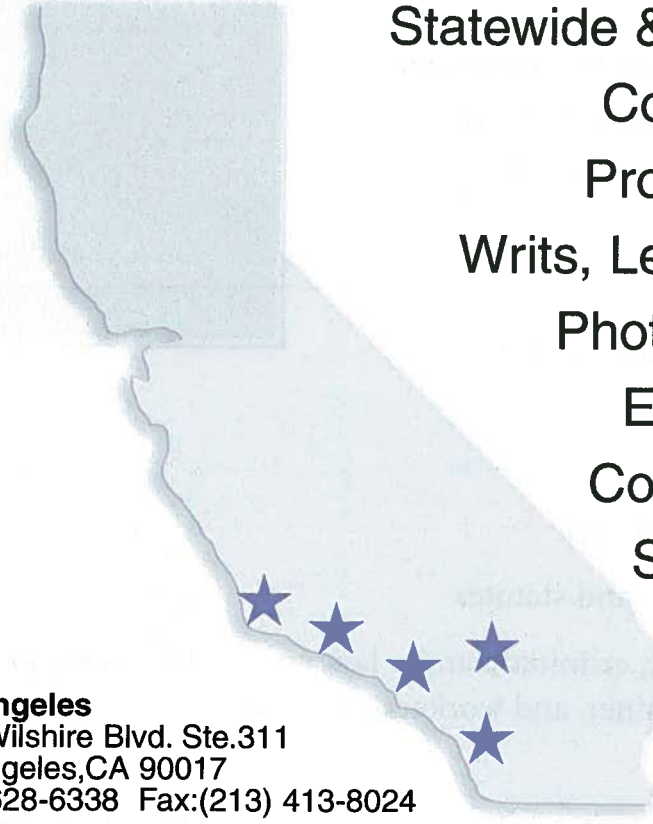
P.O. Box 660, Fortuna, CA 95540-0660

(800) 281-2188 or (707) 725-1344

Fax: (707) 725-1344 www.lsi.org



Janney & Janney Attorney Service, Inc.



Statewide & Nationwide Services

Court Services

Process Serving

Writs, Levies & Attachment

Photocopy Service

E-Fax Filings

Court Research

Skip Tracing

Los Angeles

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

Orange County

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

Ventura

155 Granada St. Ste H
Camarillo, CA 93010
(805) 388-3136 Fax: (805) 388-8181

Inland Empire

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

San Diego

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

Excellent Service • Fast Turnaround • Great Prices

www.janneyandjanney.com

PRESORTED
STANDARD
US POSTAGE
PAID
F.C.C.H., INC.