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ATLANTA ♦ LOS ANGELES
Building Membership Through Education

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 qual-
ity 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 - ex-
periencing layoffs and ter-
minations. 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 asso-
ciations 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 enthusi-
asm 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 mem-
ers, we all have the same
goals: to continue to grow
both professionally and
personally through educa-
tion – and bring this organi-
ization 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 mem-
ber 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. 
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

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)
The Part-Time Resident Tax Trap (Continued from page 5)

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 Palms 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.
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

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

### HISTORY BOOK CONTEST

<table>
<thead>
<tr>
<th>CLASS A (5-30 members)</th>
<th>No entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLASS B (31-50 members)</td>
<td>Stanislaus County LPA - Historian: Linda Brown, CCLS</td>
</tr>
<tr>
<td></td>
<td>Stockton-San Joaquin LPA - Historians: Diana J. Kalgren, PLS &amp; Colleen Young</td>
</tr>
<tr>
<td>CLASS C (51-75 members)</td>
<td>No Entries</td>
</tr>
<tr>
<td>CLASS D (76-95 members)</td>
<td>Orange County LSA - Historians: Donna Vogt &amp; Deborah Rickert, CCLS</td>
</tr>
<tr>
<td></td>
<td>Long Beach LSA - Historian: Denise Aguillard, CCLS</td>
</tr>
<tr>
<td>CLASS E (over 95 members)</td>
<td>Sacramento LSA - Historians: Cyrene Farrell, CCLS &amp; Terry Dixon</td>
</tr>
</tbody>
</table>

### SCRAP BOOK COMPETITION

<table>
<thead>
<tr>
<th>First Place:</th>
<th>Alameda County LSA - Historian: Byrna Schroeder</th>
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</thead>
<tbody>
<tr>
<td>Second Place:</td>
<td>San Diego LSA - Historian: Ashley Watson &amp; Linda Moore</td>
</tr>
<tr>
<td>Third Place:</td>
<td>San Mateo County LSA - Historian: Donn Bottinini</td>
</tr>
<tr>
<td>Fourth Place:</td>
<td>San Gabriel Valley LSA - Historian: Darlene Martinez</td>
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</tbody>
</table>

### MEMBER'S CHOICE AWARD

<table>
<thead>
<tr>
<th>History Book</th>
<th>Orange County LSA - Historians: Donna Vogt &amp; Deborah Rickert, CCLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scrapbook</td>
<td>Alameda County LSA - Historian: Byrna Schroeder</td>
</tr>
</tbody>
</table>

### BULLETIN CONTEST

<table>
<thead>
<tr>
<th>CLASS A (5-30 members)</th>
<th>El Dorado County LPA, Dana Carlson, editor</th>
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</thead>
<tbody>
<tr>
<td>First Place:</td>
<td>Cortejo Valley LPA, Barbara Hausmann, CCLS, editor</td>
</tr>
<tr>
<td>Second Place:</td>
<td>Desert Palm LPA, Donna Luzzano, editor</td>
</tr>
<tr>
<td>Third Place:</td>
<td>Desert Palm LPA, Donna Luzzano, editor</td>
</tr>
<tr>
<td>CLASS B (31-50 members)</td>
<td>San Gabriel Valley LSA, Corinne Petta, editor</td>
</tr>
<tr>
<td>First Place:</td>
<td>Livermore-Amador Valley LPA, Cheryl L. Kent, PLS, editor</td>
</tr>
<tr>
<td>Second Place:</td>
<td>Los Angeles LSA, Patricia V. Banks, PLS, editor</td>
</tr>
<tr>
<td>Third Place:</td>
<td>Los Angeles LSA, Patricia V. Banks, PLS, editor</td>
</tr>
<tr>
<td>CLASS C (51-75 members)</td>
<td>Mt Diablo LPA, Maria Bishop, CCLS, editor</td>
</tr>
<tr>
<td>First Place:</td>
<td>Beverly Hills/Century City LSA, Mimi Wong Tittus, CCLS, editor</td>
</tr>
<tr>
<td>Second Place:</td>
<td>Humboldt County LPA, Kathy Parker, editor</td>
</tr>
<tr>
<td>Third Place:</td>
<td>Humboldt County LPA, Kathy Parker, editor</td>
</tr>
<tr>
<td>CLASS D (76-95 members)</td>
<td>Orange County LSA - Dee Johnson, editor</td>
</tr>
<tr>
<td>First Place:</td>
<td>Orange County LSA - Dee Johnson, editor</td>
</tr>
<tr>
<td>Second Place:</td>
<td>San Diego LSA, Linda L. Moore, editor</td>
</tr>
<tr>
<td>Third Place:</td>
<td>San Diego LSA, Linda L. Moore, editor</td>
</tr>
</tbody>
</table>

### SCHOLARSHIP WINNERS

#### PLAN A – COLLEGE STUDENT

<table>
<thead>
<tr>
<th>First Place:</th>
<th>Orange County LSA</th>
<th>Kathryn Olson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second Place:</td>
<td>Mt. Diablo LPA</td>
<td>Luzmaritza Suarez</td>
</tr>
<tr>
<td>Third Place:</td>
<td>San Francisco LPA</td>
<td>Kimberly Cumminskey</td>
</tr>
<tr>
<td>First Alternate:</td>
<td>Riverside LPA</td>
<td>Sonia Lopez</td>
</tr>
<tr>
<td>Second Alternate:</td>
<td>Sacramento LPA</td>
<td>Anne Kirschen-Snedgrove</td>
</tr>
<tr>
<td>Third Alternate:</td>
<td>Los Angeles LSA</td>
<td>Yara Cristina Freitas</td>
</tr>
</tbody>
</table>

#### PLAN B – HIGH SCHOOL SENIOR

<table>
<thead>
<tr>
<th>First Place:</th>
<th>Los Angeles LSA</th>
<th>Patricia Alejandra Martinez</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second Place:</td>
<td>Mt. Diablo LSA</td>
<td>Alexander Zou</td>
</tr>
<tr>
<td>First Alternate:</td>
<td>Merced County LPA</td>
<td>Chaur Herr</td>
</tr>
<tr>
<td>Second Alternate:</td>
<td>Ventura County LPA</td>
<td>Jessie Autumn Peterson</td>
</tr>
</tbody>
</table>

#### PLAN C – RE-ENTRY LEVEL

<table>
<thead>
<tr>
<th>First Place:</th>
<th>Orange County LSA</th>
<th>Bonita Cravis Baranya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second Place:</td>
<td>San Francisco LPA</td>
<td>Nancy Krieg</td>
</tr>
<tr>
<td>Third Place:</td>
<td>Los Angeles LSA</td>
<td>Sharon Rose Hatch</td>
</tr>
<tr>
<td>First Alternate:</td>
<td>Stanislaus LPA</td>
<td>Susan Anne McClain</td>
</tr>
<tr>
<td>WORKSHOP DATES and TIMES</td>
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<tr>
<td><strong>Friday, August 14, 2009</strong> - 7:30 p.m. to 9:00 p.m.</td>
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</table>

**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) 805-675-8400 FAX: 805-659-8618  
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: clkccls@comcast.net

<table>
<thead>
<tr>
<th>WORKSHOP DATES and TIMES</th>
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</thead>
<tbody>
<tr>
<td><strong>Saturday, August 15, 2009</strong> — 10:30 a.m. to 12:00 p.m.</td>
</tr>
</tbody>
</table>

**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: stephjmb@sjbglobal.net

<table>
<thead>
<tr>
<th>WORKSHOP DATES and TIMES</th>
</tr>
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<tbody>
<tr>
<td><strong>Saturday, August 15, 2009</strong> — 4:00 p.m. to 5:30 p.m.</td>
</tr>
</tbody>
</table>

**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 Vomkahl, CCLS, LOA Section Leader  
3533 Sutton Loop, Fremont, CA 94536  
(H) 510-790-8337 (O) 415-984-8341 FAX: 415-226-0735  
Email: jvomkahl@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) 760-332-8336 (O) 760-352-4001 Fax: 760-352-4001  
Email: elz.adame@sbglobal.net

Name: PLS/CCLS/Paralegal  
E-mail:

Address/City/State:  
Phone: (Work) (Home)  
Local Assn.: LSA/LPA  
Expiration Date:  
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.
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 jenellis21@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

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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.

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SPECIALTY: ____________________________

FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area): ____________________________
Mr. Hospitality

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!
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
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
LSI Annual Conference 2009
Making the Most of Your Time

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
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!
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.

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HOTEL REGISTRATION DUE BY OCTOBER 22, 2009
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 Cequll 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 Cequll 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. □
Examples of the wide variety of records that the California Supreme Court has relied upon are:

- 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
- 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
- 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

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.
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 2009-2008, 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 LS1 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

- Northern California  
- Southern California  
- Saturday, March 21, 2009  
- 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*

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<td>Registration fee:</td>
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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.

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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.

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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

Attend or not attend? This is a question that many legal secretaries and legal professionals ask themselves about the conferences and seminars 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

(Continued on page 30)

Submitted by
San Diego LSA.
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

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

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. ☑
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rev. 11/17/2008
A Message From The Editor

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. ☐

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.
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.
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
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<td>LSI LEGAL SPECIALIZATION SECTIONS BROCHURE  Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)</td>
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<td>LSI MEMBERSHIP BROCHURE  Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)</td>
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<td>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.</td>
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<td>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.</td>
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August 10, 2009  Deadline to sign up for Legal Specialization Section Workshops
August 14-16, 2009  First Quarterly Conference
                     Hosted by Desert Palm LPA
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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 The Legal Secretary
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
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December 1, 2009  Deadline for submission of articles to The Legal Secretary
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