Legal Secretary

CHRISTA DAVIS
President, Legal Secretaries, Incorporated

AMERICA'S EXPERT LAW FIRM PRINTER

- 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



VOL. 63, BOOK 1

LEGAL SECRETARIES, INCORPORATED

AUGUST 2008

Copyright 2008 Legal Secretaries, Incorporated. Printed in U.S.A.

COLUMNS	FEATURES	
President's Message2	Building Membership Through Educationby Christa Davis	2
DEPARTMENTS Level Constitutions	Congratulations To 2008-2009 Officers Of Legal Secretaries, Incorporatedby Mary S. Rocca	5
Legal Specialization Section Workshops8	Contest Winners.	7
Legal Specialization Sections Membership/Renewal Form16	Lazy Daze Of Summerby Elena K. Schneider, CCLS	9
Conference Hotel Reservation22	Pro Bono Cases – Try It, You'll Like It!by Adrianna Gonzalez	11
Conference Registration23	LSI Membership - A Letter To Your Bossby Jan Sones	13
LSI Order Form25	LSI's 74th Annual Conference At Pleasanton	17
CCLS Exam Application31 LSI Benefits36	LSI's 74th Annual Conference At Pleasanton, Part 2	19
Dates to Remember39	2008-2009 LSI Officers And Chairpersons.	20, 21
Websites39	Greetings From Friendly Fortuna	24
Advertisers Index39	Unique Estate Planning Issues For Domestic Partners	27
LSI Roster40	Installation Event With A Bonus. by Kathy Parker	29
	How One Law Firm Went Green	33

by Deborah Rickert, CCLS

COVER



Christa Davis, President, Legal Secretaries Incorporated

Copyright © 2008 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, PO. 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

s I stood before the members of Legal Secretaries, Incorporated Sunday morning at the 2008 May Annual Conference, I realized that as President, the members of LSI would be looking to me for direction and leadership over the next twelve months. The example I set as your President sets the precedence for this organization. At that point, I was humbled and quite frankly, a bit scared. Would I be able to lead this organization as successfully as my predecessors? I wondered how I was going to accomplish the goals I want to achieve for

this organization. As I gave my accep-

tance speech, it dawned on me that we can achieve whatever we want if we work together. With that thought, I became energized, excited and anxious to begin my year as your President. I cannot begin to express my thanks to you the members for having the faith in my abilities to serve as your President. I look forward to an adventurous year for LSI.

Legal Secretaries, Incorporated is moving into its 74th year! That in itself is amazing! For the past 74 years, legal professionals have believed in LSI and its purposes not just to keep this organization going, but to expand its programs, opportunities and membership. Granted times have drastically changed, but so has LSI and its members.

We, the members of today are the new generation of LSI. It is evident in our new look: our marketing materials, our website, and in our approach. We are busy legal professionals – more so than in the past – but we are dedicated to our organization, and we are proud and believe in strengthening what those legal secretaries in 1934

began.

THROU

But because of the changing times, we have to work just a little bit harder to move this organization forward. Lorraine Bettencourt, PLS, CCLS, (LSI Past President 2006 – 2008) coined her theme correctly – LSI is Moving Forward; and we are. We have moved into another realm of this organization. Now it is time to reinforce what has stood for the past 74 years.

LSI was built on an educational platform. We continually strive for excellence in education, and we will continue to build on that platform,

but at the same time we must focus on maintaining and increasing mem-

> bership, so I have decided that the mindset for the ensuing year will be "Building Membership through Education." This is something we have to work on together.

To many of you, these words will sound familiar – but it never hurts to hear them again because teamwork is a very important aspect and the key to all successful organizations. Teamwork is sharing and accepting ideas of others and putting them to

work – together.

It's setting aside our own personal ideas for the good of the organization. Teamwork is understanding and contributing to LSI's goals, and working within our culture. Teamwork is respecting the thoughts of others. It is recognizing early warning signs of barriers that diminish effective unity. It is exercising the "give and take" to achieve group results; and, teamwork is learning to develop creative problem-solving ideas and reaching team consensus for best solutions.

The key to success is working together, recognizing and appreciating each member's indi-

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.

vidual ideas, and respecting one another. There is no "I" in teamwork. Teamwork is us.

We must join together and realize we all have the same goals: to continue to grow both professionally and personally through education – and bring this organization successfully through the next 74 years. We have to realize that we are one in this organization – no one person rules this roost – on the local or the state level. We must steer clear of conflict – on all levels, especially personalities. We have to keep it professional for we pride ourselves as members of a professional corporation. We can rekindle the interest in those waning members. We can bring in new members. We can continue to provide quality education. We can bring new ideas to life. We can, because We are the new generation of LSI. It's not

about me... it's not about you...it is about us. Through unity, many things are accomplished; great goals may be achieved, and each of you will continually grow stronger both personally and professionally as part of this dynamic team; but it is going to take teamwork to accomplish this. It is going to be the selfless acts of each member that will make these programs successful.

I would like this year to be a learning year for every member of LSI. Before we begin to educate others about the many wonderful qualities and benefits available to us as members, it is important to spend time educating ourselves about how to educate others. It is my hope that

in the coming year, our local association workshops will focus more on the "How To." How to present educational seminars, workshops, and training courses. We pride ourselves on offering quality educational workshops and seminars, but not all of us are born teachers. We need to learn how to present successful educational classes. Our Legal Secretarial Training/Seminar Chairman will be presenting a "How To" workshop this year. Some of our larger associations have presented successful seminars and workshops. They have the knowledge and experience of putting together these programs. I want to encourage these associations to share their knowledge and experience with other associations. After all, isn't that one of the many benefits

of LSI - sharing our experiences and knowledge?

Our California Certified Legal Secretary Chairman is excited to present workshops on putting together a CCLS Study Group, as well as providing more opportunities to study for the CCLS exam. We hope to have several presentations throughout the next year.

We pride ourselves as legal professionals – knowledgeable in the legal field, and we want to share that knowledge with other legal professionals. Unfortunately, we are not marketing geniuses, and marketing on the local level is crucial. LSI is fortunate to have the expert resources available to effectively demonstrate how to market on the local level. We need to take advantage of that expertise, and in the coming year, we will, with a "How to Market the Local Associations of LSI"

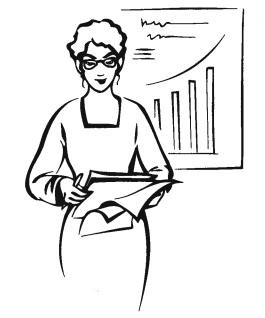
workshop.

We intend to focus on improving our professional skills, leadership skills and the various programs of LSI itself. Sometimes we take for granted that every member of LSI understands the programs we offer, how they work, and the benefits we can gain from them. Taking for granted that the newer members understand the background and purposes of the Chapter Achievement program, the Legal Specialization Sections, the California Certified Legal Secretary program only leads to minimal participation. So we intend to offer short informational classes on these programs, beginning with Chapter Achievement in August. This past

fiscal year, only 18 of the 41 local associations participated in the Chapter Achievement contest. That is not enough! Participating in Chapter Achievement can be fun; it can bring the members together, and can win recognition at the annual conference. You would be surprised to see the enthusiasm when not just the winners, but the participants of the Chapter Achievement contest are announced. Why not spend sixty minutes of your life to learn more about Chapter Achievement and what your local association can do to participate? Please consider attending, bring a beverage, relax and learn.

Beginning with the 2008 August Quarterly, the conference schedule is going to change. This change was requested

(Continued on page 4)



(Continued from page 3)

by the Governors of LSI. They felt they needed more time at conference to review the financial statistics of the corporation, and time to review and discuss with each other the contents of the Executive Committee Resume. The governors would like time to review the reports of the officers and chairmen of LSI, and also listen to their oral reports. Change is good. It is a great way to mix things up, cause a stir, and make life more exciting.

The Friday night reception is designed to welcome everyone and provide an atmosphere to get reacquainted and network. Later that evening, two Legal Specialization Section workshops will be offered.

The Board of Governors meeting will commence at 8:30 on Saturday morning, August 23, 2008. We will take a break at approximately 10:15. From 10:30 to 12:00, Legal Specialization Section workshops will be Conference attendees held. will have the opportunity to gain education through these workshops, visit the vendors, network with each other, or just relax. From 12:15 to 1:45, the Governors will meet at the Governor's luncheon; the Presidents will have an opportunity to meet and discuss the issues of their associations at the President's lun-

cheon; and a luncheon for the general membership will be held as well. Directives will be sent in early July asking for topics and concerns you wish to discuss at these luncheons. Take advantage of this time to meet and brainstorm with others.

The Board of Governors will reconvene at 2:00 to complete the business of the corporation. From 4:00 to 5:30, two additional Legal Specialization Section workshops will be presented. The banquet will begin at 7:30, so you will have ample time to relax and unwind – perhaps at the hospitality suite brought to you again this year by Don Lee of Merced County LPA. Please stop by and mingle with Don and other LSI members. A CCLS

workshop will be held and, as mentioned above, an hour-long informational workshop on Chapter Achievement will also be presented at this conference. The times of both workshops will be noted on the Official Notice.

On Sunday, we will meet for one last time at brunch. If there is any remaining business to address, it will be done at that time. We will also be treated to a short enlightening presentation. I encourage each of you to stay for the brunch. It's a great way to end the weekend and start your week with a positive attitude.

When you return from conference, please share your con-

ference experience with your local association members. So many LSI members have not had the good fortune to experience conference and see what else LSI has to offer. It's an experience that stays with you for life. It allows the opportunity to gain education, network, meet new friends and reacquaint with old friends. This is an opportunity that is rarely available at such reasonable prices. It can't hurt to ask your employer to consider paying for your scrip to attend conference. The knowledge you gain from attending conference will directly benefit your employer every day!



We have an exciting year ahead of us, but also a lot of work to do. It is time to rebuild membership through education. LSI intends to do everything possible to make this happen, but each member of LSI must participate to make this endeavor a success. Make a change in your life, step outside your comfort zone. Bring someone in to LSI, and take it a step further and invite someone new to conference. Introduce them to the Executive Committee and the members of LSI. Make them feel welcome and one of the lucky ones that get to experience conference! After all, the new generation of LSI could use some company!

Congratulations to the 2008-2009 Officers of Legal Secretaries, Incorporated

At the Board of Governors meeting held on Saturday, May 17, 2008, in Pleasanton, California, the following officers were elected by acclamation:

President

Christa Davis

Livermore-Amador Valley LPA

Vice President

Brooke Atherton, CCLS

Butte County LPA

Executive Secretary

Sandra T. Jimenez, CCLS

Imperial County LPA

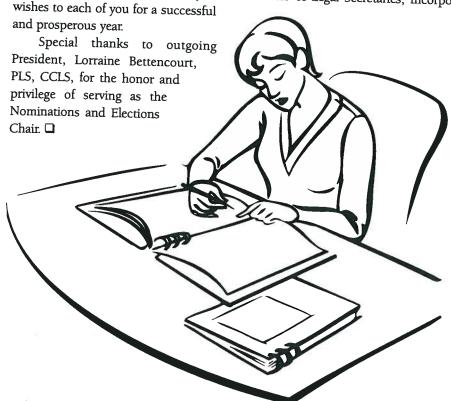
Treasurer

Mary J. Beaudrow, CCLS

San Francisco LPA

The installation of officers took place on Sunday morning, May 17, 2008. Serving as installing officer was Patricia A. Parson, LSI Past President (1988-1990). She was assisted by John Staley, Esq. who served as installing marshal.

Congratulations to the newly elected officers of Legal Secretaries, Incorporated. Our very best



LSI Nominations and Elections Chair 2007-2008



Mary S. Rocca, CCLS is a native Californian. She resides in Alameda with her husband, Lou. She has two grandsons, Tony and Nathan. Mary has been employed in the legal field for over 40 years as a legal secretary and legal assistant. Mary recently completed her 12-year term on the Executive Committee, and has been a member of Alameda County Legal Secretaries Association since 1986. She works at the Law Offices of Margaret M. Hand, PC in Oakland. where the areas of practice are probate, estate planning, probate litigation, and trust administration.



Kern Legal Services, Inc. has offices statewide and offers level pricing to all of the Major Metropolitan Areas of California for as low as \$49.50.* You will be able to control your firm's costs and you won't be surprised at Sacramento the end of the month. We want **Stockton** you to expect the same great Modesto rate for all of these areas Merced of California, so call Fresno us or visit us on the web. San Luis Obispo Los Angeles

Kern Legal Services offers a full range of litigation support services.

- Process serving nationwide
- Court house filing/Records research
- Document reproduction
- Skiptracing/investigation

Santa Ana

- On line tracking
- Offices throughout California

(800) **675-KERN** (5376) Fax (866) 241-0051

www.kernlegal.com

E-mail: orders@kernlegal.com

GALIFORNIA GONNEGION Statewide Pricing

L.A. County 1614 W. Temple St. Los Angeles, CA 90026

Orange County 1530 E. 1st St. #222 Santa Ana, CA 92701

Ventura County 2219 Thousand Oaks Blvd, #219 Thousand Oaks, CA 91362

Santa Clara County 111 W. Saint John St. Suite 610-B San Jose, CA 95113

Merced County 2440 M Street Merced, CA 95340

Stanislaus County 121 Downey Ave. #203B Modesto, CA 95354

San Luis Obispo County 1302 Marsh Street San Luis Obispo, CA 93401

San Joaquin County 343 E. Main Street Suite 507 Stockton, CA 95202

Fresno County 5528 North Palm Ave. #123 Fresno, CA 93704

Sacramento County 1023 H Street Suite B3 Sacramento, CA 95814

Kern County 31 H Street Bakersfield, CA 93304

This is for routine non-rush service (per defendant), or per count filing in most major metropolitan areas of California. Bush charges are more Please call for details.

Contest Winners!

At LSI's 74th Annual Conference held May 15-18, 2008, in Placerville, California, the winners of the annual contests were announced. They are as follows:

MEMBERSHIP CONTEST

No winners

GROUP A (5 to 30 members) GROUP B (31 to 50 members) GROUP C (51 to 75 members)

Santa Barbara LSA with a 56% increase Sonoma County LSA with a 76% increase San Fernando Valley LSA with a 40% increase

GROUP D (76 to 95 members)

GROUP E (95+ members)

Sacramento LSA with a 21% increase

HISTORY BOOK CONTEST

CLASS A (5-30 members)

First Place Second Place

Marin County LPA - Historian: Jennifer L. Page Butte County LPA ~ Historian: Kathy Nelson

CLASS B (31-50 members)

First Place

Stanislaus Co. - Historian: Linda Brown

Second Place

Riverside LPA - Historian: Mara Lynn Myers

CLASS C (51-75 members)

No Entries

CLASS D (76-95 members)

No Entries

CLASS E (over 95 members)

First Place

Orange County LSA - Historian: Christine Ross

SCRAP BOOK COMPETITION

First Place Humboldt County LPA - Historian: Deborah Allen Second Place Merced County LPA - Historian: Mary Joan Marson Third Place San Gabriel Valley LSA - Historian: Darlene Martinez

MEMBER'S CHOICE AWARD

History Book

Butte County LPA - Historian: Kathy Nelson

Scrapbook

Livermore-Amador County LPA - Historians Damell Knauss, CCLS

and Donna Merritt, CCLS

CHAPTER ACHIEVEMENT CONTEST

No entries

GROUP A (5 to 30 members) GROUP B (31 to 50 members) GROUP C (51 to 75 members)

Butte County LPA with 10,775 points Capitol City LPA with 24,700 points Long Beach LSA with 24,225 points

GROUP D (76 to 95 members)

GROUP E (95+ members)

Sacramento LSA with 58,650 points

BULLETIN CONTEST

CLASS A (5-30 members)

First Place Second Place

Conejo Valley LPA, Barbara Haussman, CCLS, editor Southern Butte, Stacey Hubbard, CLA, editor

Third Place

Butte County, Sara E. Mull, editor

CLASS B (31-50 members)

First Place Second Place

San Gabriel Valley LSA, Corinne Patera, editor Imperial County LPA, Esperanza Larios, editor

Third Place

Capitol City LPA, Cheryl Ewing, editor

CLASS C (51-75 members)

First Place

San Francisco LPA, Sally Mendez, editor

CLASS D (76 -95 members) - No entries received

CLASS E (over 95 members)

First Place

Sacramento LSA, Jennifer Garcia, editor

Second Place Third Place

Orange County LSA, Deborah Rickert, CCLS, editor San Diego, Cristina L. Conroy, editor

SCHOLARSHIP WINNERS

PLAN A - COLLEGE STUDENT

First Place: Second Place: Santa Clara County LSA San Mateo County LSA

Tina Reichelderfer Amber Jade Achziger Tabitha Muncey

Third Place: First Alternate: Second Alternate:

Orange County LSA Long Beach LSA Mt. Diablo LPA

Diana Michel Sara Goekler

Third Alternate: Fourth Alternate:

Los Angeles LSA Sacramento LSA

Jamie Redmond Yuliya Dergal

PLAN B - HIGH SCHOOL SENIOR

First Place:

Orange County LSA

Kathryn Murrell Matthew Chow

Second Place:

Sacramento LSA First Alternate: Los Angeles LSA

Raquel Gomez

PLAN C - RE-ENTRY LEVEL

First Place: Second Place:

Stanislaus County LPA Los Angeles LSA

Stockton-San Joaquin LPA

Cecelia Chaves Maria Osorio Salene Mayberry

Third Place: First Alternate:

Orange County LSA

Janis Barberi Kari Ann Gardenhire

LEGAL SPECIALIZATION SECTION WORKSHOPS

1st Quarterly Conference - August 2008 - Holiday Inn, San Jose, CA - Host: Santa Clara County LPA

REGISTRATION FORM - DEADLINE IS MONDAY, August 18, 2008

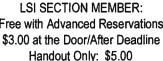
Registration MUST be RECEIVED by each Section Leader on or before the deadline.

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 NON-SECTION MEMBER:

NON-LSI MEMBER:

	ee with Advanced Reservations	\$7.00 with Advance		-	\$12.00 with Advanced Reservation	
				or/After Deadline \$15.00 at the Door/After Deadline		
	Handout Only: \$5.00	Handout On		4-0.00	Handout Only: \$7.00	
		Friday, August 22, 2008 -				
CIVIL LITI	CIVIL LITIGATION: A day in the Life of a Clerk				E PLANNING: Conservatorship Hot Topic Changing Our Plans	es:
Speaker:	Mark Schwartz, Rapid Legal		Speaker:	Bettie Bal	ker, Marshall, Esq.	
	☑ I will attend ☑ Section Member ☑ Non- ☑ Non-LSI Member ☑ Handou				tend □ Section Member □ Non-Section Mer □ Non-LSI Member □ Handout Only	nber
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			Send to:	1500 - 4th	es, CCLS,Probate/Estate Planning Section I n St., Eureka, CA 905501 41-1908 (O) 707-442-0500 FAX 707-442-29	
	Sa	turday, August 23, 2008 -	– 10:30 a.m	. to 12:00 p	o.m.	
LAW OFF		Dominant One in your luman Relationship	FAMILY L		Taken the Kids! The Hague Convention JCCJEA Forms	
Speaker:	Loui Tucker		Speaker:	Caralisa F	Pollard Hughes, Esq.	
	☐ I will attend ☐ Section Member ☐ ☐ Non-LSI Member ☐ Har				tend □ Section Member □ Non-Section Mer □ Non-LSI Member □ Handout Only	mber
	Jan Vomkahl, LOA Section Leader 3553 Sutton Loop, Fremont, CA 94536 (H) 510-790-8337 (O) 415-984-8341 F		Send to:	c/o Law O 720 West	Harrison, Family Law Section Leader ffices of Marvin J. Brown 19th St., Merced, CA 95340 23-4479 (O) 209-384-0123 FAX 209-384-16	61
		aturday, August 23, 2008	- 4:00 p.m			
TRANSAC	CTIONAL LAW: General Overview of CLLP's & LLC's	Corporations:	CRIMINA	L LAW: In	the Hood: Gang Injunction	
Speaker:	Loui Tucker		Speaker:		ney Rego, Stockton P.D.	
	☐ I will attend ☐ Section Member ☐ Non-LSI Member ☐ Har		80		tend ☐ Section Member ☐ Non-Section Mer ☐ Non-LSI Member ☐ Handout Only	nber
	Mae Brooks, CCLS, Transactional Lav 1050 S. Kimball Road, Ventura, CA 93 (H) 805-642-6478 (O) 805-659-6800 F	3004	Send to:	5534 Blac	nt, PLS/CCLS, Criminal Law Section Leade kbird Drive, Pleasanton, CA 94566 63-3440 (O) 925-837-0585 FAX 925-463-34	
Name:				E-m	ail:	
•	y/State:					
Phone: (Wo	rk) (Ho	ome)	Loc	al Assn.:		LSA/LPA
Method of P	ayment: Check 🗖 Credit Card 🗖 Nu	umber			Expiration Date:	
Name on Cr	edit Card:				•	

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICEINT 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.

Lazy Daze Of Summer

Submitted by First Quarterly Conference Chair

anta Clara County Legal Secretaries Association is proud to host the Legal Secretaries, Incorporated ("LSI") 2008 Quarterly Conference at the Holiday Inn – San José, from August 22-24, 2008. We are very excited and look forward to all of you joining us at the "Lazy Daze of Summer."

The City of San José is world-renowned for its quality of life offering a wide variety of exciting cultural, recreational, educational and entertainment opportunities, a marvelous ethnic diversity and a beautiful climate. San José has much to offer with its beautiful city parks for walking and

running (Guadalupe River Park and Trail close to the airport), great shopping malls including Westfield Shopping Town-Valley Fair and Santana Row, located just a short drive away from the hotel. The hotel is located just minutes from San José Mineta International Airport, downtown San José,

and minutes away from Paramount's Great America theme park, by light rail. All-day passes for the light rail system can be purchased for just \$5.00. San José's Downtown area includes the San José Museum of Art, the Tech Museum of Innovation and IMAX Theatre, the Children's Discovery Museum, a variety of casual and fine dining restaurants including Morton's Steakhouse, Il Forniao and P.F. Chang's. The Improv Comedy Club is located in Downtown, as well as the Camera 12 movie theatre, a variety of dance clubs, ultra-lounge bars, and more. For more informa-

tion about visiting San José, visit www.sanjoseca. gov/visitors.html.

The conference will be held at the newly renovated Holiday Inn San José located in the heart of Silicon Valley, at 1740 North First Street, in San José. The hotel is close to the worldwide headquarters for Intel, Cisco Systems, Hewlett Packard, IBM, and others. The Holiday Inn San José offers a host of special amenities you won't find anywhere in San José, including the city's largest outdoor pool and a whirlpool set amidst tropical palm trees.

Room rates are \$89.00 per night for single

and double occupancy, \$99.00 for triple and \$109.00 for quad, with a maximum of four guests per room, plus taxes and applicable fees. You have a choice of one king bed or two double beds. Rollaway beds are also available. The check-in time for the hotel is 3:00 p.m.,

and check-out time is 12:00 noon. Late check-out is available. There is plenty of complimentary parking for guests.

The guest rooms have dual-line telephones with voicemail and speakerphone, free high-speed Internet access, coffeemaker with complimentary coffee and tea, large work desk with desk-level outlets, irons and ironing boards, hairdryers, individual climate control, electronic door locks, complimentary USA TODAY® delivered each weekday morning, cable and satellite TV with in-room pay-per-view movies available. In-room

(Continued on page 12)



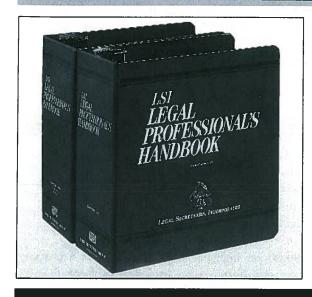
Elena K. Schneider, CCLS has been a legal secretary and member of Santa Clara County LSA since 1998. She obtained her CCLS certification in 2002.

She is currently serving as the association's Treasurer. She is employed at the law firm of McManis Faulkner in San José, California

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, show 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 1554-pg. 2006 Update was \$103.) ☐ My payment is enclosed ☐ Please bill me Legal Secretaries, Incorporated _____ PHONE (__ **LEGAL PROFESSIONAL'S HANDBOOK** E-MAIL ADDRESS STATE BAR NO. 2 Volumes • Over 2500 Pages FIRM LSI Members-Only Price \$229.50 ADDRESS Nonmembers Price\$255 (Includes shipping) ☐ Enclosed is my check for \$ payable to THE RUTTER GROUP Subtotal \$ ☐ Charge \$______on my ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS Add applicable sales tax \$ Credit Card Number_ Exp. Date Signature TOTAL \$



Pro Bono Cases - Try It, You'll Like It!

Submitted by Orange County LSA

hen people would ask me what I wanted to do for a career, my response was always, "I want to help people." With this in mind, I went to college, obtained my bachelors degree, and eventually my paralegal certificate always knowing that I wanted to be of service to others. I was not sure how this would eventually play out given that my position as a litigation paralegal at a large law firm focused primarily in large commercial litigation cases that required little to no client interaction. While

interesting and a great learning experience, I nonetheless hoped to one day work directly with clients.

The day finally came. I received an email from one of the firm's attorneys who was looking for a Spanish interpreter to work on a firm pro bono Violence Against Women Act (VAWA) case. The firm was getting more and more involved with

community pro bono cases and needed paralegals to start staffing them. Unsure about what this involved or the nature of such cases, I nonetheless excitingly responded thrilled about the idea of finally putting my bilingual skills to good use.

I met with the attorney who explained the nature and facts of the case and we telephoned the client to set-up our first meeting. A week later, we met with our client for the first time in our offices where we interviewed her to understand better the facts of her case, gathered all necessary documents, prepared her declaration, and then

submitted her completed VAWA application to Homeland Security. Within a couple months of correspondence between the U.S. Department Homeland Security and our client, her VAWA application was approved and she received a work permit to legally work in the United States.

The day our client received the good news was simply unbelievable. She literally jumped in joy and could not believe it. As a single mother without legal documentation, getting her VAWA application approved meant a new and bet-

ter future for both her and her children. Her work permit allows her to work in the United States without fear of deportation, obtain a social security card, and apply for a drivers license. She also qualifies for legal resident status in a couple of years. This as a whole, opened many doors of opportunity for both her and her children in this country.

Happy Endings—

They are rewarding and engaging cases because you are dealing with real lives, real people, and real life events. You are trying to make a client's life better in one way or another. Pro bono cases offer the unique opportunity to work on a one-to-one basis with clients and an opportunity to really get to know your clients well. Given that most of these cases are smaller and faster than traditional litigation cases, they also allow you to learn a variety of new litigation skills because you are constantly working with new fact patterns and



for Latham & Watkins LLP. She received her BA in English and Political Science from the University of California at Irvine, and her Paralegal Certificate from Cerritos Community College. Ms. Gonzalez also teaches Reading and Writing Adult Basic Education courses at Santa Ana College to adults working towards their High School diploma. She lives in Whittier, and enjoys reading and doing yoga in her spare time.

(Continued on page 12)

(Continued from page 11)

new situations in each case.

Pro bono cases are typically referred to participating law firms by legal aid agencies, law school clinics, and local shelters in the community. These agencies typically do the initial client intake and screening; eventually referring clients to participating attorneys in the area. The importance of such programs in metropolitan areas such as Los Angeles and Orange County, is that it allows for low-income and underserved sectors of our community to receive free legal representation. Many clients often don't know the first thing regarding their legal rights and are quite intimidated by the complex procedures of our judicial system. Many of those who walk through the doors of such agencies and eventually become pro bono clients would have never been able to hire an attorney without such programs.

While most of the pro bono cases that I have worked on are VAWA cases, I have also had the opportunity to work on domestic violence cases assisting clients to obtain restraining orders against their aggressor, wrongful eviction cases, and minor contractual cases. While most of my client's stories are heart-breaking and often extremely unjust, it is this type of cases that keep my paralegal career alive and interesting. They are rewarding and add a perfect balance to my workload because I know that my work and dedication is helping to make someone's life better or safer.

Pro bono clients are always grateful for our work and often cannot thank us enough for what we have done for them. For example, at the conclusion of my first VAWA case, our client who loves to cook and aspires to one day open her own restaurant, invited me and the attorney to her humble home where she cooked and served us a wonderful dinner in celebration of her newly approved VAWA application. I had never experienced such a heart warming invitation in my life before. The attorney and I were deeply touched by this great gesture of appreciation and sincere thankfulness.

While every pro bono case has its own story and its own highlighted events, all in all, every one of these cases is a sweet reminder how rewarding these cases are and of the huge difference we can make in a person's life. \square

(Continued from page 9)

video check-out is also available.

To make reservations, you may call the hotel directly at (408) 793-3947, call the Holiday Inn's toll-free number at (800) 315-2621, or make your reservation on line at www.lsi. org. The Group Code is LSI. The deadline for the group rate is August 1, 2008.

The scrip tickets include Registration, Friday Night Welcome Reception, Saturday Night Banquet, and Sunday Brunch, and if purchased on or before August 1, 2008 are \$84.00 and \$94.00 if purchased on or after August 2, 2008.

Over the weekend, you will have the opportunity to take advantage of the many educational workshops provided by the Legal Specialization Sections, network with other legal professionals, renew old friendships, and make new friends.

Santa Clara County LSA looks forward to you joining us in enjoying the "Lazy Daze of Summer" at the Quarterly Conference in San José from August 22-24, 2008.

There will be many exhibitors for you to visit on Friday from 8:00 a.m. - 8:30 p.m. and on Saturday from 8:00 a.m. to 3:00 p.m. Please stop by their tables, introduce yourselves

to them, and speak with them about their products or services that they have to offer.

The Friday Night Welcome Reception will be held poolside and will be a great time to visit with friends, chat with the exhibitors, and enjoy some music and refreshments. The dress attire for the reception will be casual.

The Governor's Luncheon, President's Luncheon and Membership Luncheon will all be held on Saturday.

The banquet on Saturday night will include surprise entertainment that is sure to please all. The dress attire for the banquet will be dress-casual.

The conference will conclude on Sunday with Sunday Brunch, and will include a special guest speaker.

If you have any questions or need more information regarding the 2008 Quarterly Conference, please feel free to contact me via e-mail at eschneider@mcmanisfaulkner.com or telephone at (408) 918-2051, or Patricia Russell at ptyvette@yahoo.com or (831) 295-9845. □

LSI Membership – A Letter to Your Boss

Dear Boss,

ou went to law school to learn how to use the rules and decisions from past legal issues to determine how to assist your clients today. They rely on you for your expertise. You keep your knowledge current by attending seminars and MCLE classes, and by consulting with your fellow attorneys.

You hired me to, among other things, type your pleadings and see that they are properly filed and served. You rely on me to calendar appropriate discovery dates, hearings, opposition and reply dates, and the cut-off dates associated with trials. I also keep my knowledge current by attending seminars and classes and by consulting with fellow legal secretaries. One of the most effective and convenient avenues for this is through a local Legal Secretaries Association.

Membership in this professional, educational group, however, comes at a cost that I have difficulty handling. While the dues are only \$50 a year, which includes membership in both the local and state organizations, the membership meetings are \$25 each month. The meetings include dinner and a one-hour educational program (for which MCLE credit is available.) I believe this investment in my career benefits you and the firm as much as it does me personally.

Often the things I learn at meetings have nothing at all to do with the topic. Sometimes I learn more from other members attending the meeting as we discuss the areas of law in which we work, how to handle particular issues, where to turn for assistance, or what is required of certain courts. I've learned, also, that this network exists for me not only locally, but (because membership in this association automatically makes

me a member of its parent group, Legal Secretaries Incorporated, "LSI") I can call members throughout the state of California to find out which forms are used by their local courts or how to accomplish our clients' needs or your instructions.

The cost for your educational needs are built into the firm's budget. Shouldn't the requisite needs for your secretary be included, as well?

Its website states:

The Association is a nonprofit mutual benefit corporation to which membership is open to persons employed as legal support staff in the office of attorneys who practice law in California. Also eligible for membership are attorneys, persons employed in the courts, and persons employed in other offices or institutions directly engaged in any work of a legal nature in this county.

Our objectives and purposes are to join together for the further education of legal secretaries and to cooperate with attorneys, judges and bar associations in stimulating a high order of professional standards and ethics among those performing secretarial and other duties in law offices. We encourage friendship, cooperation, and an exchange of ideas among members.

All Association members are affiliated with Legal Secretaries, Incorporated, a statewide organization.

In addition to the local monthly educational meetings, LSI holds quarterly conferences, hosted

(Continued on page 14)

Submitted by San Diego LSA



Jan Sones is the office manager for Mazzarella Caldarelli LLP, a midsized boutique law firm specializing in business and real estate litigation in downtown San Diego. She is also secretary to the managing partner, Mark Mazzarella.

An LSI member since 1986 when she joined the San Diego Legal Secretaries Association. Jan has held many offices within that association, and served as the 2007-2008 **President** In addition, she chaired LSI's Legal Secretarial Training and Seminars Committee in 2006. She is currently serving in that capacity for both the San Diego Legal Secretaries Association and the Association of Legal Administrators.

For fun, Jan enjoys making chocolates, doing counted cross stitch embroidery, minor home remodeling, and reading. She and her husband Joel are looking forward to a Caribbean cruise/family reunion in January with all 22 members of the Sones family.

(Continued from page 13)

by local associations throughout the state, at which they conduct the business for that corporation and offer three days of classes and seminars. LSI also sponsors the California Certified Legal Secretary program, for which members can study and sit for the 8-hour exam. It covers the same areas as the state's bar exam, but from the secretarial perspective.

The Association publishes a monthly newsletter advising members of information relevant to their field of expertise. LSI publishes quarterly section newsletters and *The Legal Secretary* magazine which also contain educational articles, many of which are written by attorneys as guest authors.

As you can see, I am serious and passionate about my career. I want to be successful and help you to be successful. Therefore, please accept this letter as my request for your help in furthering my knowledge and increasing my value to you by underwriting the cost of membership and the monthly meetings for my local Legal Secretaries Association. You might even find that I'll be bringing in new business for the firm!

Your faithful secretary,

3 reasons to file and serve your documents with One Legal.

Speed. Same-day court filing and service of process, including eFiling and eService.

Simplicity. Simple online ordering and tracking, plus we advance your filing fees.

Reliability. 99.9% accurate, on-time delivery rate.

One Legal is California's largest, most experienced legal support services provider with over 45,000 satisfied users. For professional legal support that's guaranteed, choose number one – One Legal.

*One Legal guarantees a same-day attempt for all properly prepared assignments received by the published deadline.



www.onelegal.com • 1-800-938-8815



Legal Secretaries, Incorporated LEGAL SPECIALIZATION SECTIONS

CIVIL LITIGATION
CRIMINAL LAW
FAMILY LAW
LAW OFFICE ADMINISTRATION
PROBATE/ESTATE PLANNING
TRANSACTIONAL LAW



ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION SECTIONS?

IF NOT, HERE ARE TEN GREAT REASONS WHY YOU SHOULD BECOME A SECTION MEMBER:

- Reasonable annual dues. (\$20.00 per section; \$75.00 for all six!)
- Continuing Education in all areas of the law.
- ➤ Quarterly educational programs -- <u>Free</u> to Section Members.
- Spring Regional Seminar (So. California) and Fall Regional (Northern California) offering a discount on registration fees to section members.
- Quarterly newsletters containing up-to-date information, including changes in the law, new forms, and legal articles.
- Statewide roster of all members in all sections, for easy access to local procedural information in other counties.
- California Certified Legal Secretary®/MCLE/Paralegal CEU credits.
- Networking provides a forum for the exchange of information.
- Respect from employer when you pass on valuable information obtained at workshops and seminars.
- Professional and personal excellence.

For more information, contact Margaret Tovar, CCLS, Legal Specialization Sections Coordinator.

Office: (213) 452-0115; Home: (562) 699-2006; mtovar@kbblaw.com

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.

Margaret Tovar, CCLS, Legal Specialization Coordinator, Mail to: 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):

LSI's 74th Annual Conference at Pleasanton

n May 8, 2008, I officially started my term as Governor for the Butte County Legal Professionals Association. May 17, 2008, at the Annual Board of Governor's meeting, I had my first panic attack. Only one year before, almost to the date, I was initiated into Butte County LPA. Who would have thought a year later, I would be sitting at a table with two

The day before, I attended the Pre-Annual Board of Governors meeting with Butte County LPA's outgoing Governor, Julie Edsill, CCLS. It was formal, yet kicked back. Read over this, ask questions about that, yada yada. I remember

other delegates from my association attending an

Annual Board of Governors Meeting.

thinking to myself, "this is a piece of cake." I asked a question and didn't make my association look bad - bonus points, right? Little did I know.

The rest of my day was spectacular. I had only attended one conference before Pleasanton, the quarterly conference Butte County LPA hosted in Sacramento. Even

then, I was more focused on helping with the conference and helping my fellow members keep from losing their cool. I was not able to attend some of the classes and workshops. Pleasanton was a whole different story. I was able to relax and enjoy myself in a different aspect. The workshops I attended were great. The "Professional Liaison" and "Advertising" workshops were right up my alley. They were not huge groups so it made it easier to pay attention and be able to

participate. All in all, my day was fun-filled and educating.

On Saturday, May 17, my association delegates and myself attended the Annual Board of Governors meeting. We walked in, grabbed some paperwork, and found our table. My luck, being as it is, got us a table right up front! I guess I need to get used to it considering associations were placed in alphabetical order! Our meeting began and I soon noticed that I had managed to get my packet completely out of order. By our first break I was in full blown panic mode. Thank goodness for my friend and delegate Kathy Nelson. If it was not for her, I would have cried worse than a baby and probably have had a temper tan-

trum too. Instead, I got teary eyed. She helped me get organized and when the meeting was called to order, I was ready to go.

At the CCLS Luncheon that afternoon, I was inspired to reach a goal I hadn't considered. That day, seven members of the Sacramento LSA had received their certificates for passing the CCLS exam. 7 mem-

bers! Extraordinary! You could feel the admiration oozing in the room. The women were so proud of their accomplishment, as rightfully they should. One woman's daughter was in attendance. I watched her daughter glow as her mom received her certification. It was at that exact moment I made my decision. I am going to achieve CCLS status if it kills me. Not for money, like my boyfriend hopes, but only so that I may have those four letters behind my name. In hopes

(Continued on page 18)

Submitted by Butte County LPA



Sara is a legal assistant with Harris, Sanford & Hamman. She has worked at this firm for over 2 years. She handles estate planning, trust administration, LLC's and Corporation, as well as evictions. Sara has been a member of LSI and Butte County LPA for over a year. She and her boyfriend have been together for the last 5 years and between the two of them, they have 2 kids. Sara's son Brendan is 7 years old and Kevin's daughter, Kairah, is 9.

(Continued from page 17)

that one day, one of my kids will be as inspired and proud as that woman's daughter.

Throughout the day, my association received various awards and I attended two Legal Specialization workshops. I was on cloud nine. I floated from room to room. Never before had I been so determined. Never before had I been so terrified. My life is pretty hectic as it is. Work, two kids, the boyfriend, even my dog. School, chess team, girl scouts, doctors appointments, regular meetings. How in the world am I going to find the time to study for the CCLS exam, be Governor, mother, girlfriend???

The last day of the conference, Sunday, May 18, answered my questions. It was that morning Christa Davis was installed as LSI's new President. As I sat there and listened to her acceptance speech, I was in awe. She worked so hard to achieve the rewards in life. I can work that hard! She then thanked her husband and the strongest person she knows, her daughter Olivia. It was at that moment I realized Olivia was in a wheelchair.

I quickly remembered the excuse that I and others like me have used, "I just don't have the time." It literally hit me

how quickly that excuse went out the window, ironically, in a windowless room. President Davis joined LSI in 1988 or 1989, she couldn't quite remember which and says she has grown ten-fold. When asking Madame President if I may talk about her in my article, she responded with something that will stick with me forever.

"...In order to grow in life, you have to take chances even if you don't think you'll be able to do it or have the time, and if you take on those challenges, most times, you will be so glad you did."

To put it simply, if Madame President can do it - I can do it. I have decided that I am going to take that chance and beat that challenge. Being a Legal Secretary is who I am. I knew the legal field was for me. This will be my life and career. I will conquer the challenge and overcome adversity - all in the pursuit of education and personal lifetime achievement.

Who knows, maybe one day I'll be sitting at the head table... $\ensuremath{\square}$

DEPOSITIONS IN

SACRAMENTO

CAROL NYGARD

& ASSOCIATES

- ❖ Real-Time / LiveNote
- Internet Webcast Depositions
- * Rough Draft ASCII Disks
- Daily Transcripts
- **❖ Quick Turnaround Delivery**
- E-mail Transcripts
- Videography with Time Stamping
- Interpreters
- Complimentary: Condensed Transcripts
 ASCII Disks
- Videoconferencing
- 5 Free Conference Rooms
- Free Parking
- **❖** 5 Minutes from the Airport
- Free Airport Pickup & Return
- Concierge Service Available

DEPOSITION REPORTERS



A full service deposition firm Specializing in Complex Litigation

4180 Truxel Road, Suite 100 Sacramento, CA 95834 (916) 928-8999 (916) 928-9989 Fax www.SacramentoCourtReporter.com





LSI's 74th Annual Conference at Pleasanton, part 2

hat a fantastic conference! I am so proud of my association! In attendance from Butte County LPA were our three delegates: Kathy Nelson, Sara Mull and Lynn Renard. Also attending was our local president, Susan Jarratt and members Lisa J. Fanos, CCLS, who was also a vendor and Julie Edsill, CCLS.

For me, conference preparation starts almost as soon as the last conference ends. As LSI's Executive Secretary, some of my duties include preparing the Official Notice, preparing the Roll Call and an Agenda for the Governors' Luncheon.

Sadly, I do not have as much free time as my local association members. My conference weekend began on Wednesday - time to pack the car and head to Pleasanton. Once I arrive at the hotel, I unpack my boxes, confirm that the laptop and printer will work properly and then pack my computer case for the Executive Committee meeting in the morning. I double check before going to bed that I have all my files, computer gear (mouse, external keyboard, extension cord, etc.) all set and ready to walk out the door.

On Thursday of Annual Conference (Fridays for Quarterly Conferences) the Executive Committee (EC) meeting begins at 8:30 a.m. We usually conclude at 5:00 p.m. As Executive Secretary, I am taking notes of all oral reports by other members of the Executive Committee and other chairman that come in during the day to keep us updated. After the EC meeting, I dash up to my hotel room and prepare the EC Resume. Once that has been approved by the LSI President, my next stop is the nearest FedEx/Kinko's or Staples to make copies. The EC Resume is then provided to Governors, delegates, past presidents and Members-at-Large and must be added to the packets either late that night or first thing in the morning - before the Board of Governors' meeting begins!

Saturday is the Board of Governors meeting and I am busy taking notes so that the official Minutes can be prepared and distributed to the local association Governors, past presidents and members at large.

While visiting with our vendors, Pam Stallings of Santa Clara LPA, asked me about my experience on the Executive Committee - how had I changed, what had I learned? Her question was thought provoking and continues to resonate in my mind as I unpack and prepare for our August Quarterly Conference.

I have learned to appreciate the time and effort of other officers and chairman that help LSI move forward. Ten years ago I had no idea the work that goes into preparing a budget. I had no clue about the hours that go into not only preparing a proposed budget (a duty of the LSI Ireasurer), but the hours that the members of the Executive Committee spend at the February Quarterly Conference to review and modify it before the LSI membership ever sees it.

I have learned to appreciate the hard work that the Legal Specialization Section Coordinator (LSS) does to secure speakers for our LSS workshops at conference and secure speakers and locations for our Fall and Spring Regionals. I value and respect the work of the editor of *The Legal Secretary* magazine. She oversees the production of a top notch, quality magazine that we can all be proud of. The efforts and long hours the members of the Publications Revision Committee (PRC) give to LSI astounds me. The members of the Continuing Education Council begin their conference work day at 7:30 a.m. and diligently prepare and proof the CCLS Mock Exam, and keep our Instructor Guides current.

The list goes on and on. Learning about LSI began many years ago at the local level when I volunteered for one committee, and then another, and then serving my local association as a board member. I continue to be amazed at the stellar group of woman (and men) who I have the opportunity to work with within LSI! This is truly an amazing organization and I am honored to be a part of it.

If you have not attended a conference, please plan on joining us in August! You will be amazed, thrilled and motivated like never before!

LSI Vice President



Brooke Atherton, CCLS, a member of Butte County LPA, currently serves as LSI's Vice President. She has served her local association as Governor, Secretary, President and various chairman positions. Brooke is the office manager/paralegal at her husband's law office in Paradise, California. Brooke and her husband, Chris, have two grown children, Blake, who is curreintly serving in the US Army, and Jennifer, who lives in Southern California and is an Economics Professor, teaching at several community colleges in her area. In their spare time, Brooke and Chris enjoy wine tasting and weekend trips to Reno. Brooke also knits for Socks For Soldiers and is on the Board of Directors for a property owners association in Monterey County.



2008-2009 LSI Offic

ELECTED OFFICERS



Christa Davis President



Vice President



Lorraine Bettencourt, PLS, CCLS Kay Bliss, PLS **Executive Advisor (CEC)**



Parliamentarian



LEGAL SPECIALIZATIONS

Margaret Tovar, CCLS Coordinator (CEC)



Elizabeth Adame, CCLS **Civil Litigation**



Sandra T. Jimenez, CCLS **Executive Secretary**



Mary Beaudrow, CCLS



Doro Nesbitt, CCLS **Editor-In-Chief**



Deborah Rickert, CCLS **Editor, The Legal Secretary**



Cheryl Kent, PLS, CCLS **Criminal Law**



Stephanie Harrison Family Law

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





Jennifer Page Educational Program Coordinator (CEC)



Denise Lopes, CCLS Historian



Jan Vornkahl **Law Office Administration**



Leslie Ames, CCLS Probate/Estate Planning





Catherine Culver, CCLS Administrator



Margaret Tovar, CCLS Legal Specialization Sections Coordinator (CEC)



Mae Brooks, CCLS Transactional Law

rs and Chairpersons



CHAIRMEN



Debbie Tankersley 2009 Annual Conference



Mara Lynn Myers Advertising



Astrid Watterson, CCLS California Certified Legal Secretary (CEC)



Sally Mendez Career Promotion/ Scholarship



CCLS CERTIFYING BOARD

Joan M. Layte, CCLS



Paula Delp, CCLS Member



Debra Clark Nejak Director of Public Relations



Barbara Barregar Legal Procedure (CEC)



Cindy Illum Jones Legal Secretary Training (CEC)



Lorraine Bettencourt, PLS, CCLS **Nominations and Elections**



Julie Edsill, CCLS





Georgia Peterson Professional Liaison/ Day in Court





Mitchell Driskill, Esq.

PUBLICATION COMMITTEE



Doro Nesbitt, CCLS Editor-in-Chief (CEC)



Lugene Borba, CCLS Editor, LSI Legal Professional's Handbook



Maria E. Bishop, CCLS Editor, Law Office Procedures Manual



Karen J. Jones



Loretta R. Maxwell, CCLS **Assistant Editor**



Diane M. Mecca **Assistant Editor**



Ann Boccia Rosado **Assistant Editor**



lackie M. Stanko, CCLS Assistant Editor



RIVERSIDE LEGAL PROFESSIONAL ASSOCIATION

invites you to join in celebrating

SHINE ON, HARVEST MOON

November 14 – 16, 2008 LSI Quarterly Conference

HOTEL RESERVATIONS



A NATIONAL HISTORIC LANDMARK HOTEL AND SPA

ROOM RATES:

\$139 per night for single/double occupancy \$15 per person additional charge Plus room tax of 11%

Deadline for group rate: Monday, October 13, 2008

ROOM RESERVATIONS:

- 1. Call directly to Mission Inn (800) 843-7755
- 2. Online at www.missioninn.com

PARKING:

Parking for registered hotel guests: \$8 self parking (per night) \$15 valet parking (per night)

AIRPORT SHUTTLE SERVICE:

Complimentary round-trip shuttle service to/from Ontario Intl Airport. Advance reservations required a minimum 24 hours prior to arrival.

Contact Hotel Guest Services at 951-784-0300, ext. 5036

CHECK-IN/OUT:

Check-in time:

3 p.m.

Check-out time:

FOR MORE INFORMATION:

Kay Bliss, CCLS, 951-826-8265 <u>kay.bliss@bbklaw.com</u> Cynthia Deszcz, CCLS, 951-826-8336, <u>cynthia.deszcz@bbklaw.com</u> 3649 Mission Inn Avenue Riverside, CA 92501 (951) 784-0300







RIVERSIDE LEGAL PROFESSIONAL ASSOCIATION

invites you to join in celebrating

SHINE ON, HARVEST MOON

November 14 – 16, 2008 LSI Quarterly Conference Mission Inn, Riverside, CA

CONFERENCE REGISTRATION FORM

Name (as it will appear on bad Mailing Address: City/State/Zip: Home Telephone: Work Telephone: E-mail Address: Local Association (please spell c						
PLEASE CHECK IF APPLICABLE AI	ND INCLUDE TITLE:	PLEASE CHE	CK IF Y	OU ARE:		
☐ State Officer		☐ Governor		CCLS	☐ PLS	ě
☐ State Chairman						
SCRIP (includes Registration, We POSTMARKED ON OR BE POSTMARKED OCTOBER	FORE OCTOBER 12, 200	nquet, and Brunch 08 \$73 \$83	s			
Registration by October Registration after October Welcome Reception (Fric Governor's Luncheon (So President's Luncheon (So Membership Luncheon (Banquet (Saturday eve Brunch (Sunday)	er 12, 2008 day) aturday) aturday) (Saturday)		\$8 \$18 \$8 \$25 \$25 \$25 \$38 \$23	\$ \$ \$ \$ \$		
TOTAL AMO	DUNT ENCLOSED			\$		_
Please indicate choice of:	Dijon Chicken or	Chef's Ch	oice Ve	getariar	1	
Please make checks payable t	o: RLPA 2008 CONFER	ENCE FUND				
Mail to: Sandra Lul Varner, Sal	kens, Registration Chai leson & Brandt LLP, 255	rman 5 W. Foothill Blvd., S	Suite 210), Uplan	d, CA 92	2522
For general information contac Kay Bliss, CCLS Cynthia Deszcz, CCLS		oliss@bbklaw.com hia.deszcz@bbkla	w.com			

Greetings From Friendly Fortuna

LSI Administrator

ortuna? Where is that, you might well ask. It is in beautiful, coastal Humboldt County; about a five hour drive north of San Francisco. Fortuna is home to the world famous coastal redwoods, and is also the location of Legal Secretaries, Incorporated's (LSI) corporate office. It is a small office located in a mixed commercial/residential development. The home garage of last year's champion stock car at the local Redwood Acres racetrack is located next door. So sometimes it gets a bit noisy.

My job is to help LSI's local associations with their business. I supply you with brochures to promote LSI, and therefore membership in your association, as well as brochures promoting LSI's California Certified Legal Secretary (CCLS) program, and the Legal Specialization Sections. In addition, I am the person who ships out your Legal Secretary Reference Guides, CCLS pins, Law Office Procedures Manual Instructor Guides, membership and president pins, CCLS mock exams, new member packets, and any other products listed on the LSI order form.

I answer telephone calls and email inquiries regarding membership and events happening in your local associations. Sometimes vendors call wanting to know how to participate in quarterly conferences. Many people call inquiring about possible CCLS preparation classes.

May marked one year serving as your administrator. It has been a learning curve and continues to be so. A goal of the 2008-2009 year is to set up a database in MS Access. Designed correctly, the database will help LSI track information that may not have been captured previously.

In connection with maintaining membership

records, I supply the mailing list to the printer of *The Legal Secretary*. If you, or any member of your association, do not receive an issue of *The Legal Secretary*, please notify this office. Not only will I send you a copy of the missing issue, I will check to be certain that I have your correct address before referring the delivery problem to the editor of the magazine.

LSI's redesigned website has given a boost to sales of reference materials. It is easy to use, so members and non-members alike are taking advantage of ordering online. In addition, the website is used as the media for state officers and committee chair reports delivered at quarterly conferences, as well as the place to download directives by your association's local officers and chairs. LSI is doing its part to GO GREEN by posting these reports and directives online, rather than mailing out paper copies.

People have said when they have telephoned this office that they are sorry to bother me. LSI hired me to serve its members. It is my pleasure to do so. The job is not full-time, so my hours are irregular. But I return phone calls within a day (or three if you call late on a Friday and I am not in), and check the email often. For the record, the email address is: lsiorg@suddenlinkmail.com. The toll-free telephone number is (800) 281-2188. The facsimile is the same line. Please feel free to call me with any questions you may have. If I don't know the answer, I will find someone who does and get back to you. I also welcome suggestions and fresh ideas for better service. LSI's corporate office is committed to Building Associations through Education.



Catherine Culver, CCLS, is LSI Administrator. She received her BA in economics from Denison University in Granville, Ohio, her paralegal certificate from UCLA Extension, and earned her CCLS in 2003. She resides in Fortuna, California, with her husband, Scott Downie, and their Black Labrador Retriever, Sydney.

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform	\$ 5.00		S
their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)			
CAREER PROMOTION/SCHOLARSHIP NOT JUST A SECRETARY	5 00		
BOOKLET A 26-page booklet designed to assist local associations in promoting the			
career of legal secretary. Includes handout materials and an outline for use at career and			
scholarship promotion events. (Rev. 2/98)			
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS	N/C		
Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)		=	
CCLS MOCK EXAM 2006 Sample questions and answers to assist in preparing for	20.00		
all sections of the CCLS Exam.			
CCLS PIN A 1/2" high, 10-karat gold pin with CCLS logo. For the CCLS.	35.00		
CCLS STUDY KIT Contains Mock Exam (see above), Gregg Reference Manual	120.00		İ
with Basic and Comprehensive Worksheets and Instructor's Resource Manual.			
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide,	N/C		
including forms and samples, essential to any association considering a bid to host an			
LSI Conference. (Rev. 2/08)			
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL	5.00	1	
PROGRAM A 34-page guide, with sample forms, to assist with the planning and			
execution of a successful legal educational program. (Rev. 8/03)			
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND	5 00		
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)			
HISTORY OF LEGAL SECRETARIES, INCORPORATED A 50-page memory	5.00		<u> </u>
of people, places and events since 1929. (Rev. 2/06)	2,00		
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement	N/C		
of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)	11/0	7.	
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist		<u> </u>	L
instructors in conducting training classes Teacher Training Chapter offers tips for	E		
teaching. Other Guides supplement Chapters of the LOPM and contain projects,	3		
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	İ	
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	 	
	7.00		
CRIMINAL LAW CHAPTER (Rev. 9/07)		ļ	
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	30.00		
to assist local associations in conducting a training class. Also useful for training office			1
personnel and as a general reference for experienced staff. (Rev. 4/07)		<u> </u>	
	TOTAL THIS	PAGE	\$

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI	\$ 500		s
Governors.		1	~
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11"	N/C		
advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)			
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered	N/C		
and reasons for joining. Includes Section Membership Application. (Rev. 2/08)			
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of	N/C		
LSI membership and programs. Contains request for membership application (Rev 2/08)			
LSI MEMBERSHIP PIN* A ¼" high oval gold-tone pin with blue and white enamel	3.00		
overlay LSI logo in center and "Legal Secretaries, Incorporated" inscribed on	3.00		
circumference. For all LSI members.		.	
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-	N/C		
presidents, honorary members, scheduled conferences, local association presidents and	10		I
governors.			I
MEMBERSHIP APPLICATION FORM* An 8 ½" x 11" form adopted 5/01 by	N/C	□ E-mail	
LSI for use by all local associations. Includes request for Legal Specialization Sections		-or-	
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.		[
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President,		☐ Printed	
LSI membership information, Specialization Sections Membership Application, list of	N/C		
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.			
PRESIDENT'S PENDANT* A 1" high oval gold-tone pendant with blue and white	7.00		
enamel overlay LSI logo in center and "Legal Secretaries Association" inscribed on			
circumference. Eye for necklace chain on back. For local association presidents.			
PRESIDENT'S PIN* Same as pendant (see above), but with pin on back.	7.00		
	TOTAL THIS		\$
TOTAL	PREVIOUS PA		\$
	TOTAL ORD		\$
CALIFORNIA SALES TAX (7.25% O	TOTAL ORDI	ER) +	\$
MAILING/SHIPPING AND HANDLING (15% OF	TOTAL ORDI	ER) +	\$
T	OTAL AMOU	NT =	\$
PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO CORPORATE OFFICE, P O BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (7) INFORMATION MUST BE INCLUDED ORDER WILL BE MAILED OR SHIPPED WIAVAILABILITY	LEGAL SECR 707) 725-1344. THIN 10 DAYS	ETARIES, INCO CHECK OR CI OF RECEIPT,	ORPORATED, REDIT CARD SUBJECT TO
DELIVER TO: NAME ASS			
ADDRESS CITY	STATE _	ZIP_	
DAY TELEPHONE () E-MAIL			
Method of Payment: Check, payable to "LSI," enclosed	VISA 🗍	MASTE	RCARD
Credit Card Information: Number Expiration	Date: Month	Ye	ar
	Card Verifica	ion 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 525 PENALTY. PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

Unique Estate Planning Issues for Domestic Partners

number of complex estate planning issues exist for domestic partners that do not recognition at the federal level of any relationship other than heterosexual marriage. These issues and distinctions complicate traditional estate planning techniques and require analysis for each couple's specific circumstances.

The first issue is whether a couple should even register with the California Secretary of State as domestic partners. Registered domestic partnership is equivalent to marriage under California law. However, federal law does not recognize any relationship other than heterosexual marriage and offers absolutely no benefits to domestic partners, registered or otherwise. Thus, registered domestic partners bear all the responsibilities and burdens of marriage under California law (joint responsibility for debts, necessity for formal divorce proceedings upon dissolution, requirement to file joint state income tax returns) without any of the federal marriage benefits in such areas as social security, immigration, income taxes, estate taxes, or veterans benefits. In the absence of federal recognition and benefits, the additional state income tax burden alone might weigh against registering as partners with the Secretary of State.

During their lifetimes, domestic partners must also be aware that gifts or transfers of assets between the partners in excess of \$12,000 in any calendar year will constitute a taxable gift and will trigger the necessity of filing a federal gift tax return and potentially the payment of gift taxes if total taxable gifts exceed the \$1 million lifetime exemption. Married couples enjoy an unlimited marital deduction for lifetime gifts between the spouses. For example, many domestic partners are not aware that simply adding a partner to title on one partner's home will likely constitute a taxable gift.

Upon death, married couples enjoy the benefits of the unlimited marital deduction for federal estate taxes. This permits a surviving spouse to defer payment of estate tax that would otherwise be due upon the death of his or her spouse until after his or her own death. Conversely, there is no marital deduction available to domestic partners,

so a surviving domestic partner may have to pay estate taxes immediately upon the death of their partner without any opportunity to defer that tax bill. Advance planning will be critical to ensure that liquid assets will be available to satisfy a potentially large estate tax bill without necessitating a "fire sale" of liquid assets, such as a business or the family home.

When a married couple owns real property as joint tenants with right of survivorship, upon the death of the first spouse, there is a presumption under tax law that both spouses contributed equally to the purchase of the property. However, for unmarried joint tenants, the presumption is the opposite, i.e., that the entire property was owned by the deceased joint tenant. To rebut this presumption, the surviving joint tenant bears the burden of proving "contribution," i.e., that he or she contributed to the purchase price, taxes, loan payments, maintenance, etc. Without such documentation, which could extend back for decades, the entire value of the property will be attributed to the deceased joint tenant's estate which could unnecessarily trigger or increase estate taxes.

Similarly, married couples are entitled to a "double step-up" in basis on both halves of all community property upon the death of the first spouse. This provides a substantial capital gains tax benefit to the surviving spouse for assets that have greatly appreciated in value during the marriage. Conversely, domestic partners are only entitled to a step-up in basis on the decedent's half of community property assets, which increases the capital gains taxes a surviving domestic partner must pay upon sale of the assets as compared to a surviving heterosexual spouse.

The disparity between California and federal law relating to domestic partnership requires thoughtful analysis and consideration of traditional estate planning techniques. Moreover, many issues have yet to be considered and ruled on by the courts so much uncertainty faces domestic partners attempting to plan for the future. These issues will continue to develop over the coming years as California and other states evolve in their recognition of non-traditional family relationships and legal issues bubble to the surface over time.

Submitted by **Desert Palm LPA**

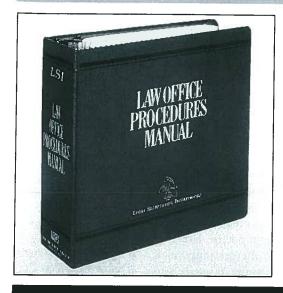


Joseph T. Hahn is an attorney in the Estate Planning, Probate and Trust Administration Practice Group of Best Best & Krieger LLP, in the firm's Indian Wells office. He advises clients in all areas of estate and gift tax planning.

LEGAL SECRETARIES, INCORPORATED

LAW OFFICE PROCEDURES MANUAL

... THE IDEAL TRAINING MANUAL FOR NEW STAFF!



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 412-pg. 2006 Update #2 was \$36.)

- ☐ My payment is enclosed
- ☐ Please bill me

LAW OFFICE PROCEDURES MANUAL

Over 1175 Pages

LSI Members-Only Price \$125.10

Subtotal \$

Add applicable sales tax \$

TOTAL \$

 NAME
 PHONE (_____)

 E-MAIL ADDRESS
 STATE BAR NO.

ADDRESS SUITE ZIP

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

☐ Charge \$______on my ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS

Credit Card Number _____ Exp. Date ______
Signature



Installation Event With a Bonus

Submitted by Humboldt County LPA

n Thursday, May 8, 2008, the Humboldt County Legal Professionals Association ("HCLPA") held its 37th annual installation of officers, installing Kathy Parker for her second one-year term as president, along with Vice President Denise Lopes, CCLS, Secretary Sheryl Brown, and Treasurer Carrie Mays. Governor Leslie Ames, CCLS, was installed in a gubernatorial two-year term. HCLPA had the honor and privilege of having Catherine Culver, CCLS, LSI Administrator, as the installing officer for the incoming officers. (HCLPA is lucky to have been the originating association of membership in LSI for Catherine, as she became a California Certified Legal Secretary while a member of HCLPA, and went on to serve one term as governor before accepting a position as the new LSI Administrator in 2007.)

The incoming president's theme for 2008-2009 is "Always bear in mind that your own resolution to succeed is more important than any one thing." (Abraham Lincoln, 16th president of the United States, 1809-1865.) While the president's theme is portrayed throughout the year in the newsletter, the scrapbook (or history book), and correspondence in the association with various bears, the theme of the evening was a fiesta, held at Chapala Café, in Eureka, California.

The incoming officers were féted and "toasted" with a chili pepper garland for the governor (she is the "spice of life" in our association and our "link" with our parent organization), a piñata for the incoming treasurer (with an admonition to not "break the bank"), maracas for the incoming secretary (she keeps our "rhythm and flow" memorialized in the corporate minutes), a margarita shaker set for the vice president (she "welcomes" new members hospitably), and a sombrero for the president (she "caps off" what needs to be done).

A fun time was had, and HCLPA graciously thanked the outgoing officers, Chris Cook (outgoing secretary) and Barbara McGee (outgoing treasurer), who will both be renewing their membership and working as chairs of other committees.

The highlight of the evening was the annual awarding of local scholarships to two graduating high school students, Rebecca Harnden of Arcata, California, and Caleb Curteman of Fortuna, California. Rebecca plans to attend college and eventually become an attorney who specializes in agricultural issues; Caleb will be attending business college. The scholarship funds were donated by Humboldt County Superior Court judges, the Honorable Harold E. Neville and the Honorable John Morrison.

A bonus to membership in the association is the knowledge that our efforts not only educate legal professionals in our community, but we are pleased and proud that we can encourage and support the education of young people who plan to work in the legal field. HCLPA is committed to promoting education and agrees with the incoming LSI president's theme that education is a key component to success. \square



Kathy Parker has been a legal secretary for 14 years and a member of Humboldt County Legal Professionals Association since 1995, where she has held many chairmanships and officer positions, and is currently presiding in her second term. She holds vocational certificates as Legal Secretary and Paralegal, as well as an A. S. Degree in Paralegal studies. She is employed at Mitchell, Brisso, Delaney & Vrieze in Eureka as an insurance defense litigation secretary. Kathy and her husband reside in Bayside and enjoy five children and one granddaughter, with a grandson on the way.



Incoming HCLPA officers for 2008-2009: Leslie Ames, CCLS, Governor; Sheryl Brown, Secretary; Kathy Parker, President; Denise Lopes, CCLS, Vice President; Catherine Culver, CCLS, LSI Administrator and installing officer; Carrie Mays, Treasurer.



Student Caleb Curteman; Connie Scheckla, HCLPA Scholarship Chair; student Rebecca Harnden; Kathy Parker, HCLPA President.

NEW CCLS® MOCK AVAILABLE

The 2006 CCLS® mock is now available from Corporate Office. This mock covers all 7 sections of the exam.

Send check for \$25.40 to:

LSI Corporate Office P.O. Box 660 Fortuna, CA 95540-0660

CCLS® STUDY KIT

CONTENTS:

Gregg Reference Manual, Worksheet & Answer Key (9th Edition) Mock Examination Study Guide, Orientation Manual

To obtain your copy send a check for \$149.39 to:

California Certified Legal Secretary LSI Corporate Office P.O. Box 660 Fortuna, CA 95540-0660



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"

HUTCHINGS** 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

California Certified Legal Secretary



Rev. 05/06

A Program of Legal Secretaries, Incorporated

APPLICATION



This form may be reproduced.

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 P. O. Box 391626 Mountain View, CA 94039-1626

	Northern California				Saturday, Octo	ber 18, 200	8
	Southern California				Saturday, Marc	h 21, 2009	
accepte	ne: Application must be reed up to 30 days prior to elow, if space is available.	the examination	ys prior to on if submit	ted wi	th a \$25 late fee, in	application <u>m</u> addition to th	<u>ay</u> be
	LSI MEMBERS** Registration fee: Examination fee: Total	\$ 15.00		Nor Reg Exa	n-LSI MEMBERS gistration fee: amination fee: al	\$ 55.00	
Encl	osed is a check in the Fees subject to change LSI members: Name of Please enclose a pho You must be a member Include \$25 late fee if a	e without notion of local associent of octoopy of your or upon applic	ce. ation: our local m	nemb	***, payable to LSA	VLPA.	2 J
	1. A	-			Last 4 Digits	of SSN	,
,	g Address: tate/Zip:						
•	hone:						
E-mail	(s):			· · · · · · · · · · · · · · · · · · ·			

Please Complete Reverse Side

Highest level of formal education	completed:; Highest Degree:
with your most recent (or curren	ase list legal secretarial employment, beginning t) employment, to show a minimum of two full years upplemental page if additional entries are necessary ment as a legal secretary.
Dates	Position
Employer	
Address	
Supervisor	
Summary of Duties	
N-10-10-10-10-10-10-10-10-10-10-10-10-10-	
6	
Dates	Position
Employer	
City/State/Zip	
Supervisor	Phone
Summary of Duties	
result in the revocation of my certific examination are confidential and are	plication truthfully. I understand that a false statement may cation. I understand and agree that the contents of the not to be discussed. I understand that my employment the California Certified Legal Secretary Certifying Board.
Signature of Applicant	Date

How One Law Firm Went Green

Submitted by **Alameda County LSA**

he first thing you notice when you walk off the elevators is the extraordinary wood flooring. You know that something different is supposed to be going on here – something 'green.'

Nixon Peabody is one of the first law firm offices in the country applying for environmental certification from the U.S. Green Building Council under its program for Leadership in Energy and Environmental Design, but you're not yet really sure what the certification means. So you focus on the first thing that catches your eye in the firm's new San Francisco office, something that might give you some clue as to what sustainable building is all about.

As it turns out, you're right to have noticed the wood floors. They're made of Forest Stewardship Council-certified orchard wood. The wood for the floors in each of the elevator banks and in the reception area is from old California walnut orchards that have finished their mission of bearing fruit. You may have noticed that the lighting in the stairwell is soft and soothing, but what you didn't realize is that the overall lighting design in the elevator foyer and throughout the office uses low-wattage and high-efficiency bulbs.

You proceed from the elevator well to the main reception area, hoping to finally get the green message. But rather than an interior you suspected would somehow look either earthy or futuristic, what immediately catches your eye is the 150-foot stretch of panoramic views of San Francisco landmarks and sweeping vistas of the San Francisco Bay. The walls in the reception area and adjacent conference rooms are made of clear glass, allowing natural light from outside to flow through the reception and conference areas. One thing that does cross your mind is that you wouldn't have to turn on many lights during the day around here.

You see that the biggest lesson Nixon Peabody

learned in deciding to 'green' (yes – it's also now a verb) its new San Francisco office is that the line between good design and sustainable design doesn't have to stand out like a green thumb. The more we researched and consulted with the design team at Gensler Architects, the more we were drawn to the conclusion that we didn't just want to direct them to come up with a certifiably green space.

Rather, we concluded that we had to first determine our own basic design goals as a firm and an office, and then begin to explore how to achieve those in the most sustainable way reasonably possible. With that in mind, we established our goals as using clean and safe building materials and natural light to enhance the work environment and create a pleasant space with access to daylight and views, using appropriate and environmentally friendly materials and design practices, and tying these elements together through innovative architectural design. Once our goals were established, we had our in-house team, our Gensler advisers, and everyone else who would play a part in developing our new space sit down and together create a strategy for accomplishing these goals. No decisions would be made piecemeal or in a way that later foreclosed important environmental decisions.

Oh, one more thing — our financial manager said we had to stick as close as possible to the budget we had been given before we made the decision to go green. Back to the drawing board? Not really. Let's get one thing straight: Don't let the naysayers tell you that they support green development in general, but it's just too cost-prohibitive. Does it cost more? It depends.

What 'shade of green' do you want to achieve? What are your top priorities? And most importantly, how much creative thinking are you and your team willing to do to come up with innovative, environmentally sound ways to design,

(Continued on page 33)



Jeffrey Lesk is a partner in the firm of Nixon Peabody. He concentrates his practice in matters relating to community development, real estate syndication and securities, real estate acquisition, development and finance, and affordable housing.

Mr. Lesk is a leader in Nixon Peabody's firmwide green initiative and worked with the San Francisco office to develop one of the first law firms in the country to submit for certification from the U.S. Green Building Council under their program for Leadership in Energy and Environmental Design.

(Continued from page 33)

develop, and manage your office in a way that still achieves your basic goals for the office? In going through this process we (like developers of any real estate project) did a lot of cost-benefit analysis and made some tough decisions.

Our current estimate of going green will result in an expenditure in the neighborhood of 1.5 percent more than what we would have paid for a similar nongreen office build-out (and, of course, the cost will be offset by energy and water savings, which will appear immediately and increase over time). But that number was not derived with a formula. It was driven by constantly weighing our environmental priorities against our budget realities, exploring many options, and making some tough choices.

Here are some of the things we ended up doing:

Every law firm wants a beautiful reception area -- it's often the first impression you make on clients and would-be clients. In addition to maximizing the visual and natural lighting advantage of floor-to-ceiling windows in our reception and conference room area, we installed display countertops adjacent to the reception desk that are made of Icestone, a beautiful composite material consisting of recycled glass and mother-of-pearl shells. The carpeting used throughout the office has received a Green Label Plus certification, a sustainable standard in the carpet industry. (Standard carpeting often uses toxic glues and adhesive backings and is often made from nonrenewable resources.) The speckled countertops on the coffee bars are made with a material consisting of recycled plastic bottles, and the floors are Marmoleum, an environmentally friendly, rapidly renewable product made from linseed oil. The entire office space is painted with paint that is not derived from volatile organic compounds.

The new furniture includes round 'tree trunk' coffee tables made from fallen trees and chairs made of natural, formaldehyde-free materials and high recycled content. As importantly, more than 60 percent of our furniture was reused from our previous office, so no new natural resources were used for those items. And we managed to recycle 75 percent of all materials from the demolition of the previous office. Other key elements of our new green office include dual-flush toilets and low-flow faucets. Because our local utility doesn't provide for the direct purchase of renewable power, we are investing (through buying renewable energy certificates) in green power enterprises to subsidize their production of renewable energy equivalent to 100 percent of the amount of our expected electric usage.

One of the biggest lessons we learned? Green development isn't just about the flooring, furniture, windows, water conservation measures, or paint. One of the best green decisions you can make is in site selection. We chose one that is in an optimal location for our employees to take public trans-

portation -- subway, train, bus, bicycle, and ferry are all viable commuting options to our San Francisco office. And even the length of your lease has an impact. We chose a long-term, 12-year lease, minimizing future building material use.

WHAT'S SO GREEN?

How did it turn out? The best compliment I've received is from a client (well-versed in real estate development and finance), who concluded, 'I can't really tell what's green about it, but it's a spectacular office.'

But why did we take on the mission in the first place? One of Nixon Peabody's strong practices is in the field of government-assisted development. We guide clients through the complex world of using government incentives to develop socially oriented development projects, such as those providing affordable housing, community revitalization, and historic preservation. The government agencies providing assistance for these projects have placed a growing emphasis on adding sustainable development requirements to the mix.

So we got a head start in the field by figuring out for, and with, our clients exactly what this means and how to accomplish it. We already were experts in real estate development, but we had to learn much more about sustainable development and resource conservation. This unearthed some disturbing facts about the general effect of buildings on the environment. Some studies have concluded that the development and operation of buildings accounts for 40 percent of the nation's energy consumption, 40 percent of landfill waste, and between 40 percent and 50 percent of ozone-depleting carbon production. Those are staggering numbers. How could we justify the fact that the projects we were facilitating were producing this type of negative effect?

That question was critical in my decision to focus as much energy as possible on environmental stewardship — on both a personal and professional level. In addition to joining forces with Enterprise Green Communities to establish the first national conference on incorporating sustainable development into affordable housing and community development projects, I launched a speaking campaign to educate the affordable housing and community development industries and encourage them to undertake sustainable projects.

TAKE A LOOK

But I also asked my Nixon Peabody colleagues to take a hard look at what we could do as a firm. The response has been tremendous on many levels. Creating our green office was an important (and highly visible) step. But it is far from the only one. We have several practice groups with environmental and energy conservation emphases, including real estate, affordable

housing and community development, energy/environment, intellectual property, private equity (clean technology), renewable energy tax credits, project finance, and energy regulation.

When we started a dialogue about our individual green client issues and capabilities, we found that many of us in the various groups had similar personal and professional concerns — and a similar desire to commit to make sustainability an important part of our practice. So we created a firmwide 'green team' and began meeting weekly and working together on projects and client development. As other groups (such as corporate finance) have discovered that their industries are also focusing on green measures, they have joined the team as well. Not only has the endeavor brought together attorneys (and professional staff) from all of these groups, but it's also taught us all a lot about cross-staffing and cross-marketing — both of which are a lot easier when you really have a common goal. We are also using our strong training infrastructure to lead national workshops on green-related topics.

Our individual offices, including our office here in Washington, D.C., are also beginning to develop and implement green operational plans, such as paper reduction efforts, green office maintenance programs, and stepped-up recycling programs. It can be slow going, particularly because part of the process has involved developing programs from the ground up, but it's starting to take shape.

As is often the case, the same things that we were wrestling with were also on the minds of many of our clients. And by going through the process ourselves, we aligned ourselves with our clients, demonstrated our commitment to the environment, and strengthened our skills to better serve our clients. One of the most important aspects of our green office is that it serves as a model and showcase for clients and other businesses to see that sustainable development can be done on a practical, cost-effective basis and that green design can be beautiful design. \square

©2007 ALM Properties, Inc. All rights reserved. This article is reprinted with permission from Legal Times (www.legaltimes.com), an ALM publication.

LEGAL FUN

В	F	K	E	\mathbf{T}	C	I	D	R	E	V	0	R	P	F
Α	I	F	W	E	C	N	E	D	I	V	E	R	E	В
I	В	I	I	S	0	G	F	U	P	Y	C	U	G	Y
L	I	L	W	\mathbf{T}	U	E	E	J	\mathbf{T}	N	N	U	D	V
A	L	E	E	I	N	R	N	U	Y	E	E	0	U	U
I	Α	F	L	M	S	I	D	R	V	U	\mathbf{T}	T	J	K
R	W	\mathbf{T}	М	0	E	G	A	Y	C	S	N	I	J	Z
\mathbf{T}	Y	С	F	N	L	Н	C	L	U	A	E	U	C	\mathbf{z}
A	E	С	H	Y	U	\mathbf{T}	Q	C	P	S	S	R	G	М
D	R	\mathbf{T}	С	Α	R	S	U	W	I	\mathbf{T}	N	E	S	S
W	A	R	N	P	R	L	I	V	I	C	E	M	R	Α
0	E	N	E	C	S	G	\mathbf{T}	C	J	Α	F	I	N	E
Y	H	X	В	A	P	P	E	Α	L	F	F	R	G	L
Y	P	S	S	0	J	Z	I	E	P	\mathbf{F}	0	С	I	P
Q	Z	Q	Q	E	L	L	M	S	H	E	E	L	S	U

ACQUIT	EVIDENCE	PLEA
ALIBI	FACTS	PROVE
APPEAL	FILE	RIGHTS
BAIL	FINE	RULE
BENCH	GUILTY	SCENE
CASE	HEAR	SENTENCE
CHARGE	JAIL	SWEAR
CITE	JUDGE	TAPE
CIVIL	JURY	TESTIMONY
COUNSEL	JUSTICE	TRIAL
CRIME	LAWYER	VENUE
CUSTODY	OATH	VERDICT
DEFEND	OFFENSE	WARN
DUTY	PLAINTIFF	WITNESS

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/

LINDA L. TODD, AFLAC Agent 1891 Mt. Creek Court

San Jose, California 95148

Phone: (408) 270-0507 - Fax (408) 270-2695
Pager: (408) 860-8001

AFLAC Supplemental Accident and Disability,
Short Term Disability, Cancer, Intensive Care
And §125 Plans

MOSTMAN & BROOKS (800) 524-0905

TERRY MASTMAN, CLU, ChFC Phone: (818) 360-7155

ELEANOR BROOKS, CLU
Phone: (818) 833-6860 - Fax (818) 368-5144
11801 Balboa Boulevard
Granada Hills, California 91344
Disability, Life Insurance, Dental Plans, Long

Term Care, Mutual Funds

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) 438-6003 (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
(877) 679-9784 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) 654-2210
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

reetings Everyone! My thanks to Christa Davis, President of Legal Secretaries Incorporated for having appointed me as editor and with your help, I plan to get the magazine out full of interesting photographs and articles to be received by you prior to each conference. In order to do this we need to become a team and I need all of your help.

I would like to thank each association and chairperson who contributed to the August issue of *The Legal Secretary*, and especially thank those chairpersons who sent in their photographs "before the deadline" for the Officer and Chairman center photo page.

As announced at the Post Governors

meeting, Christa asked to see more articles about "us," the LSI members in the magazine. If your association has a special event, please share it with all LSI members and submit an article and photographs to be included in the next issue. While I look forward to receiving your articles, please

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 the Annual Conference. 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 at least one article. If it's possible to get a second article sometime throughout the year, that would be great! 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. So, keep those articles coming.

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. Please feel free to contact me for a full set of the Guidelines or checklist, or to answer any questions you might have.

(Continued on page 38)



Deborah Rickert, CCLS is editor of The Legal Secretary and President of Orange County LSA. She has been a legal secretary for 25+ years, and worked at Latham and Watkins LLP for over 10 years. Deborah is secretary to two partners and a senior associate doing civil and patent litigation.

Deborah is married to Johny and they enjoy traveling all over the world. She is a native Californian and has lived her entire life in Southern California.

GUIDELINES FOR SUBMISSION OF ARTICLES TO THE LEGAL SECRETARY

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 81/2" 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.
- 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. 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 or no more than 2,500 words.
- 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

WEBSITES

http://infomine.ucr.edu/index.html Scholarly internet resource collections

www.lawguru.com/ Legal forms, tools, dictionary

www.usa.gov

US Government - a link to different areas of government

www.ipl.org/div/news The Internet Public Library

www.theultimates.com Phone books, email directories

www.treas.gov/offices/enforcement/ofac/ US Department of Treasury, Office of Foreign Assets Control

www.cms.hhs.gov Center for Medicare and Medicaid services

DATES TO REMEMBER 2008

August 18, 2008 Last day to sign up for Legal Specialization Section Workshops

August 19, 2008 Last day to submit CCLS Exam application to CCLS Certifying Board

August 22-24, 2008 LSI First Quarterly Conference

Hosted by Santa Clara County LSA Holiday Inn – San Jose, California

September 1, 2008 Deadline for submission of articles for November issue of The Legal Secretary

October 18, 2008 CCLS Examination

Northern and Southern California locations

November 14 - 16, 2008 Second Quarterly Conference

Mission Inn - Riverside, California

Hosted by Riverside LSA

January 21, 2009 Last day to submit CCLS Exam application to CCLS Certifying Board

February 27 - March 1, 2009 Third Quarterly Conference

Concord Hilton Hosted by Mt. Diablo

March 21, 2009 CCLS Examination

Northern and Southern California locations



2008-2009 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: mbeaudrow@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: plsccls@aol.com

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

Editor-In-Chief (CEC)
DORO NESBITT, CCLS
Home: (916) 884-9423; Office: (916) 920-5286
Fax: (916) 920-8608
E-mail: dnesbitt@comcast.net

Editor, The Legal Secretary
DEBORAH RICKERT, CCLS
Home: (714) 847-4499; Office: (714) 755-8132
fax: (714) 755-8290
E-mail: deborah.rickett@lw.com

Educational Program Coordinator (CEC)
JENNIFER L. PAGE
Home: (415) 898-1010; Office: (415) 721-2040
Fax: Please call first
E-mail: jipage@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@kbblaw.com

CHAIRMEN

2009 Annual Conference DEBBIE TANKERSLEY Office: (562) 896-3758 E-mail: debsmk@aol.com

Advertising
MARA LYNN MYERS
Home: (909) 681-9366; Office: (626) 684-5530
Fax: (909) 684-9421
E-mail: casamara@aol.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

Home: (707) 648-9266; Office: (415) 421-7151 Fax: (415) 362-8064

E-mail: smendez@alshulerberzon.com

Director of Public Relations
DEBRA CLARK NEJAK
Cellular: (209) 743-5975; Office: (209) 369-9255
Fax: (209) 369-9288
E-mail: debranejak@yahoo.com

Editor, LSI Legal Professional's Handbook LUGENE BORBA, CCLS Home: (209) 852-2790; Office: (209) 576-7777 Fax: (209) 576-7139 E-mail: lucds@hughes.net

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

Legal Proceedure (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 GEORGIA PETTERSON Home: (209) 836-5761; Office: (925) 225-9600 Fax: (925) 463-3110 E-mail: g_petterson630@yahoo.com

LEGAL SPECIALIZATION SECTIONS

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

Civil Ligitation
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@gagenmccoy.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 VORNIKAHL
Home: (510) 790-8337; Cellular: (510) 493-6636
E-mail: institches@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
DORO NESBITI, CCLS
Home: (916) 684-9423; Office: (916) 920-5286
Fax: (916) 920-8608
E-mail: dnesbitt@comcast.net

Editor, LSI Legal Professional's Handbook LUGENE BORBA, CCLS Home: (209) 852-2790; Office: (209) 576-7777 Fax: (209) 576-7139 E-mail: luccls@hughes.net

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

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

Assistant Editor
LORETTA R. MAXWELL, CCLS
Home: (213) 309-0929; Office: (714) 634-2522 x3616
E-mail: Irmaxwell_cds@yahoo.com

Assistant Editor
DIANE M. MECCA
Home: (209) 529-3101; Office: (209) 23B-0946 x210
Fax: (209) 23B-0953
E-mail: diane@friendandwalton.com; ks24fanatic@aol.com

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

Assistant Editor
JACKIE STANKO, CCLS
Home: (925) 427-5451; Office: (925) 847-3359
E-mail: jacqueline.stanko@farmersinsurance.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 JOAN LAYTE, CCLS Cellular: (650) 703-5247; Office: (650) 461-5328 Email: jmlcds@yahoo.com

Members PAUŁA DELP, CCLS JULIE EDSILL, CCLS ANNA WILLIAMS, CCLS ROBYNNE YOUNG, CCLS

Attorneys/Educators
MITCHELL DRISKILL, ESQ

LSI CORPORATE OFFICE

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

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

LSI – EDUCATING CALIFORNIA'S LEGAL PROFESSIONALS



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!



Name:	ORDER FORM:
Address:	
E-Mail:	
Number of Copies:	

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 Diego4891 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.