

THE Legal Secretary®

August 2014



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MOVING ONWARD AND UPWARD IN UNITY

BY MARY J. BEAUDROW, CCLS

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

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

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Moving Onward And Upward In Unity

BY MARY J. BEAUDROW, CCLS



MARY J. BEAUDROW, CCLS

is President of Legal Secretaries, Incorporated and a member of Mt. Diablo Legal Professionals Association. Mary has worked in the legal field since 1977, and has worked for the law firm of Morrison & Foerster LLP since 2002, where she is currently a Senior Docket Coordinator. Mary is a former member and Past President of San Francisco Legal Professionals Association.

As I stood before the members of Legal Secretaries, Incorporated on Sunday morning at the 2014 Annual Conference, I felt excited and energized knowing that I was beginning my first term as LSI President. I am thankful to the membership for bestowing this honor upon me, and I am looking forward to working with the Executive Committee, the appointed officers, and the chairmen of LSI as we work together to enhance all that LSI has to offer.

We celebrated our 80th year at the Annual Conference this past May. It is very exciting to see how far this organization has come since 1934 when Eula Mae Jett came up with an idea that has since morphed into the organization we enjoy today. It is important to remember where we started, and appreciate how far we have come, how much we have grown, and recognize that we still have much to do. I am a strong believer in knowing and understanding the history of LSI and passing that information on to the legal community.

The key to LSI's success is working together, recognizing and appreciating each member's individual ideas, and respecting one another. In order to continue moving forward, we must work together as a unified organization.

I feel it is time for LSI to assist our local associations by providing their members an opportunity to attend LSI conferences. At the February 2014 Quarterly Conference, the Governors approved the Executive Committee Recommendation that LSI award five scrip tickets per conference, to five associations that are located within a reasonable distance of each conference. At the Post Annual Board of Governors meeting, five associations were chosen to receive a scrip ticket for the August 2014 Quarterly Conference which will be held at the Embassy Suites in Sacramento, hosted by Sacramento LSA. Those associations are Livermore-Amador Valley LPA, Mt. Diablo LPA, San Francisco LPA, San Mateo County LSA, and Southern Butte LPA. Congratulations to each association!

California Certified Legal Secretary Chairman Terri Quinton, CCLS, will continue to present workshops at each quarterly conference that cover various subjects contained on the CCLS exam. Terri will also be hosting two on-line CCLS study groups, with the first one beginning in August. This program was a huge success this past year with 27 legal professionals attaining their CCLS status.

Legal Secretarial Training/Seminar Chairman, Shaylene Cortez, CCLS, will again be presenting an on-line beginning legal secretary course, as well as an on-line discovery class this year. Offering on-line courses provide additional options for continuing education, and also are a great marketing tool to bring in new members.

In an attempt to offer a luncheon option to those members attending conference who are not a local association president or governor, an "Open Luncheon" will replace the "Membership Luncheon." We want to provide an additional venue for members to address issues of concerns, brainstorm, and of course network. The Open Luncheon will allow the Vice-President, who moderates

this luncheon, to present a variety of topics to discuss, in addition to membership. Also, this luncheon will provide an opportunity to have a guest speaker present topics that are important to our members.

The Continuing Education Council will continue to present workshops on Friday evenings at each conference, before the Friday Night Reception. These workshops provide another educational opportunity for our members.

The Marketing Committee will be busy this year as we launch our new LSI website. We will also begin using our new LSI logo this year and the Marketing Committee will be looking into various events where they can market LSI. At the Annual Conference this past May, the members of the Executive Committee decided against having LSI attend this year's Annual State Bar Conference in San Diego. The last few years we have seen a decrease in foot traffic at State Bar and feel there are better ways that are more cost effective for LSI to market our organization.

In addition to the efforts of our Marketing Committee, every member must market LSI. I cannot stress enough how important it is for each member to introduce LSI to our employers, co-workers, and the legal community.

Make a change in your life, step outside of your comfort zone. Bring someone new in to LSI. Take it a step further



and invite someone new to attend an LSI conference with you. Introduce them to the Executive Committee and the members of LSI. Help them to experience all that LSI offers. But most importantly, make them feel welcome. Make them realize the advantages of being a member of Legal Secretaries, Incorporated. **LS**

CCLS Quiz:

Ability To Communicate Effectively

1. I am [A] adverse [B] averse to all things Kardashian.
2. Roger is smarter [A] than [B] then he thinks.
3. I will choose [A] whoever [B] whomever I believe is most qualified.
4. [A] Jane's and Tom's [B] Jane and Tom's houses are on adjacent lots.
5. Her opinion will have no [A] affect [B] effect on what I ultimately decide.
6. He has decided to retire [A] due to [B] because of his ill health.
7. Nancy sent the letter to Sue and [A] me [B] I for our review.
8. Her [A] womens' [B] women's group is meeting next week.
9. We need to take discovery [A] further [B] farther in order to prepare the case.
10. Neither the attorneys nor the judge [A] is [B] are sure what the witness said.
11. The Board [A] is [B] are traveling to the inspection in their own cars.
12. This series of books and short stories [A] looks [B] look very exciting.
13. The assigned trial date is [A] affecting [B] effecting my vacation plans.
14. The closing parenthesis [A] are [B] is omitted in this case.
15. Harold said that he would take [A] whomever [B] whoever needed a ride to the game

SEE PAGE 17 FOR QUIZ ANSWERS



MAY 2014 | CONCORD HILTON, CONCORD

LSI Annual Conference







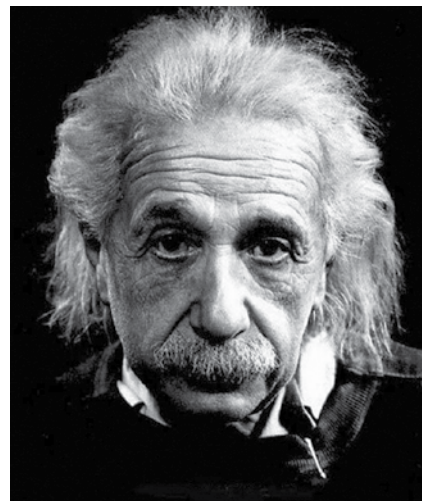
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The Zeitgeist Of Incivility

BY J. CARLOS AGUIRRE, M.A., ORANGE COUNTY LSA

"It has become appallingly obvious that our technology has exceeded our humanity."

— Albert Einstein



According to the fourth annual *Civility in America: A Nationwide Survey* conducted by Weber Shandwick and Powell Tate, 70% of Americans feel incivility has reached crisis levels in this country. A study by the nonprofit group Public Agenda calls us "the land of the rude" and suggests that we are simply meaner and more hostile to each other than ever before.

Zeitgeist is a German term that literally means "Spirit of the Time." It has become brutally obvious that civility has become an anachronism. Generally speaking, rudeness is on the rise and has become the banner of our current Zeitgeist. The evidence is abundant, one need only turn to the media to hear belligerent talk show hosts and bellicose political criticism with smug self-certainty or take note of freeway drivers who readily display obscene gestures if you are in the way because you are driving at the speed limit. In some instances, rudeness has turned tragic, when one parent beat-up another to death regarding a soccer match! Such extreme instances bring home the notion of a need for manners to instill civility back into civilization. "We've lost our civilization. The barbarians are loose," says etiquette specialist Joy Davies of Savoir Faire.

The workplace is a good barometer of societal values or as Pamela Bedour, founder of Protocol School of Ontario notes, "the general decay of society's manners is being reflected in business: our own pleasure, convenience and primacy are superceding anything else. "The other day I

saw a T-shirt that expressed this Zeitgeist succinctly, "It's All About Me." The message is very clear, my satisfaction is primary, and you are here, well... to satisfy me!

Do you sometimes feel that those in the legal profession could use a course in human relations? Or as one attorney noted, "I don't expect to substitute courtesy for competence, but it seems to me that unless we maintain some standards (of etiquette), the profession will soon become unbearable." The high pressured, crucial and many times overworked profession should not give into the standard of rudeness in the pursuit of justice. In July 2009, a "Civility Toolbox" for California attorneys was implemented after being developed by a Civility Task Force because of the "perceived decline in civility in the practice of law." In light of such a declined standard of professional behavior by the legal profession the California Supreme Court passed a new rule, effective as of May 23rd 2014 that requires new lawyers being admitted to the California State Bar to take a "Civility Oath" pledging to behave with dignity, courtesy and integrity.

From a business standpoint, incivility has a negative ROI. According to Weber Shandwick, research and public relations firm, "Since reputation is a company's most competitive asset, workplace civility cannot be taken for granted. Incivility can negatively impact retention and recruitment not to mention customer service. Ultimately, incivility leads to a reputation cost."

Employers should consider that uncivil employees can mean higher attrition rates, lower morale and productivity, greater legal risk and increased chances that clients will bear the brunt of an unhappy or uncivil representative.

How and when did we lose our way? Etiquette consultant, Rosanne Thomas states, *"We can almost pinpoint the decline of manners and etiquette to the 1960s."* For those of us who can remember, they were those wild and crazy 60s, when the catch phrase was, "you do your thing and I'll do mine" and decorum was thrown out the window in the spirit of self-absorbed expression. Compound this with an increasing pace in technology, increased population density, the informality of e-mail, downsizing, i.e., fewer people having to do more work "doing more with less" and economic insecurity, poor role models in the media, lack of civility in upbringing and ever increasing stress and pressure, and lastly, our society's virtual sensory overload on our nervous systems and the result is stressed-out and ill-mannered behavior in the workplace.

When most people think of manners or etiquette what generally comes to mind is knowing which fork to use in a formal dining situation, but good manners is as simple as following the "Golden Rule," treating others with kindness, respect and a general appreciation of their humanity. Nor are good manners necessarily related, as some might think, to an insincere but polite form of expression. I prefer Frances Hesselbein's, CEO of the Drucker Foundation, definition that states that *"Good manners flow not from patterned niceness, but genuine appreciation of colleagues individually and the dignity of the work their colleagues do."*

What is civility? According to civility expert, Lew Bayer, defining civility is complex as it represents many components, but it can be said to represent the overriding values and character of an individual. Ms. Bayer noted (3) key features of civility as: 1) **conscious awareness** of the impact of our behavior on others, 2) **continuous acknowledgment** of one's responsibility to ease the experience of others vis-à-vis restraint, kindness, respect, and 3) **consistent effort** to adopt and exhibit civil behavior as a non-negotiable point of one's character. Whereas, etiquette and manners are more representative of cultural-specific rules and convention. In other words, civility is much more comprehensive and overarching in scope and directly reflective of one's character development. A good mnemonic when thinking of civility is the 3 Rs: **Respect, Responsibility and Restraint.**

Want to get ahead in your profession? Success in the workplace entails more than specific skills or ambition as well documented research has borne out. A study by Harvard University, The Carnegie Foundation and the Stanford Research Institute shows that technical skills account for only 15% of the reason you get, retain and advance in a job. That's right; a whopping 85% is directly related to your social skills! So how can one's social skills contribute to a civilized workplace? Your behavior leaves a lasting impression for better or for worse. Your actions can make the workplace more enjoyable for you as well as others. You can be a "civilizing force." How? By keeping things in perspective, try putting one's ego in check. Instead of personalizing others actions which may seem disagreeable, realize that their behavior is a direct reflection of their character, this awareness allows you the freedom to act and not react. You are always responsible for your behavior, whereas our society has played up the victim mentality or "the devil made me do it" syndrome.

The following are some suggested "Pillars of Office Diplomacy" –

1. **Respect:** *honoring another person's being, acknowledging and giving deference to their uniqueness and abilities*
2. **Levity:** *a quality or a state of being light; not taking oneself overly serious*
3. **Receptivity:** *to be open and responsive to others and ideas*
4. **Goodwill:** *a benevolent interest or concern toward others; a kindly feeling of approval and support for others*

Finally, civility is but an admonition to our better nature, an acknowledgment of people's intrinsic worth. Courtesy is the "lubricant" of human relations, whereby the daily grind of things are smoothed out and made a little more pleasant. A better office environment starts with us and with a few kind words such as "please," "thank you" and the showing of appreciation. Your words and actions have a direct impact in raising or lowering the bar in the legal profession. The next time you want someone's cooperation, remember civility is never out of vogue.

"Kindness is the golden chain by which society is bound together."

— Johann Wolfgang Von Goethe

LS



DENISE LOPES, CCLS, has been a legal secretary/paralegal for approximately 49 years and obtained her California Certified Legal Secretary (CCLS) designation in 2003. She was a member of SEDLSA (in Los Angeles County) for approximately 20 years and has been a member of Humboldt County LPA since 1989. In June 2015, she and her husband, Johnny, will celebrate 50 years of marriage. Since 1965, Denise has been a legal secretary and later a paralegal and is currently employed by Lisa A. Russ, a sole practitioner, who specializes in probate, trust administration, and estate planning.

Estate Planning In Action, From The Fiduciary Perspective

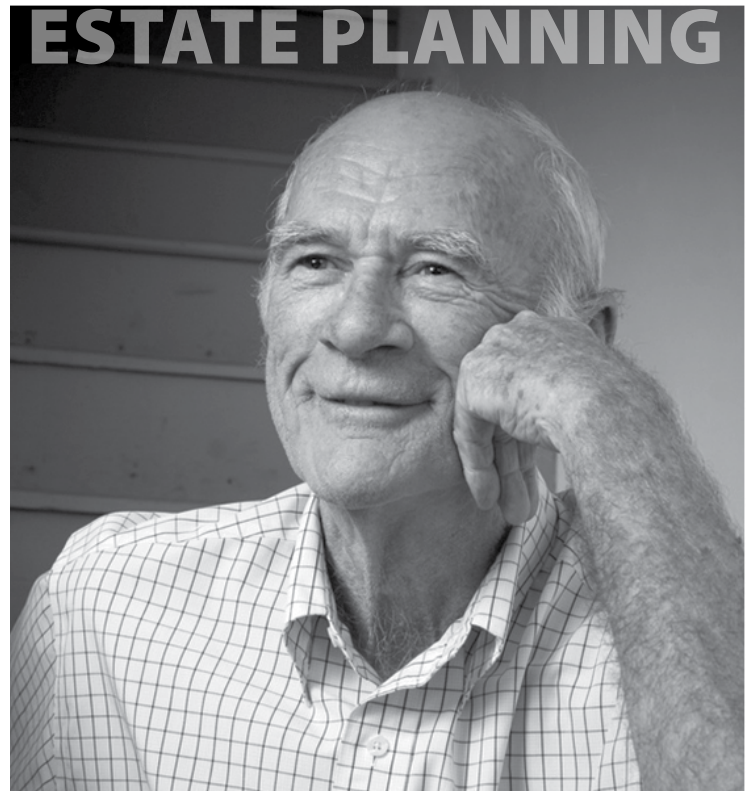
BY DENISE LOPES, CCLS, WITH THE PERMISSION OF LISA K. HANSEN, CLPF, NCG, HUMBOLDT COUNTY LPA

My boss, Lisa A. Russ, is a member of Humboldt - Del Norte Council on Estate Planning & Elder Care and each month the council arranges for a presenter to provide a one-hour program to local attorneys, accountants and other professionals interested in estate planning issues. In May 2014, the presenter was Lisa K. Hansen, CLPF, NCG, a partner at Hansen & Pereira, Professional Fiduciaries. Lisa K. Hansen has been licensed as a California Licensed Professional Fiduciary and National Certified Guardian since 2009, and serves in the formal fiduciary roles of trustee, trust protector, executor, conservator, and power of attorney for finance and/or health care. She has an accounting background and experience in corporate risk management and small business management.

The following information is taken from the handout from the Humboldt - Del Norte Council on Estate Planning & Elder Care presentation in May 2014:

A PROFESSIONAL FIDUCIARY'S INVOLVEMENT DURING DRAFTING OF DOCUMENTS.

1. Prior to being named, Humboldt County fiduciaries prefer contact from the client and/or attorney regarding the fiduciary's interest in and/or ability to serve. Some fiduciaries offer initial consultations free of charge, some charge a reduced fee. Reminder: A named fiduciary has no duty to act; therefore, the review of documents by fiduciary in advance helps ensure that a named fiduciary will act when the time comes.
2. For new or restated estate planning documents, most fiduciaries prefer to review draft documents in which he/she may be named since the document (trust, will, durable power of attorney, advance health care directive) is the fiduciary's instruction manual, along with the Probate Code, and any known facts about the client. The fiduciary needs to make sure the documents and instructions are clear, reasonable, and current from an administrative standpoint (i.e. fees, accountings, investments, etc.) and not just from the client's standpoint. The document is also the fiduciary's "contract" and the document may need to be reviewed by the fiduciary's own attorney.



3. A fiduciary will work with the attorney and the client to create documents which are acceptable to the fiduciary and the client. Once the documents are finalized, the fiduciary should be provided with a copy of each document.
4. Most Humboldt County fiduciaries will then meet with the client to complete in-house paperwork in preparation for the time when it becomes necessary for the fiduciary to serve. Most Humboldt County fiduciaries also like to follow up with the client on at least an annual basis.

COMMON ISSUES ASSOCIATED WITH THE DRAFTING OF ESTATE PLANNING DOCUMENTS.

5. Trusts/Wills - Schedule/Exhibit A. Regarding the preparation of a trust, the schedule of assets should be as comprehensive as possible rather than just referring to assets in a general nature (i.e. all real property, all bank accounts, etc.).
6. Trusts/powers of attorney. Lisa K. Hansen has noticed that a reasonable compensation clause is usually included in trust documents; however, such a clause is almost never included in power of attorney or advance health care documents and such a clause should be included in those documents as well.
7. Trusts - Accountings. Pursuant to Probate Code Section 16062(e), it is "against public policy" to waive accountings in trust documents. A California Licensed Professional Fiduciary should almost always prepare an annual accounting and will charge for such an accounting. A tax return is not adequate illustration of trust/estate activity in the majority of cases. Estate of Giralдин (2012), Salter v. Lerner (2009) - Duty to Inform vs. Duty to Report vs. Duty to Account, Probate Code Sections 16060-16062. In the case of a formally incapacitated or frail client, where a fiduciary is serving as power of attorney or trustee of a non-court-supervised trust, without any family members to report to, consider including a reporting clause (i.e. report to attorney or accountant). In any situation, an ounce of prevention in the form of communication is preferable to a boatload of legal fees, and fractured families, down the road.
8. Trust - Trust Protector. For clients with either limited or very simple assets AND a competent and willing family member fiduciary, to achieve a professional level of oversight while incurring fewer administrative fees, the client may wish to consider naming a California Licensed Professional Fiduciary as the trust protector.
9. Power of Attorney - Springing versus Non-springing Powers. Springing powers of attorney may be acceptable for younger, healthy clients. In most instances, however, a non-springing power of attorney is preferred as it may be difficult (when the time comes) to obtain the necessary physician letters of incapacity which are required by a springing power of attorney. In some areas, there are no local geriatric psychiatrists and in my experience, most physicians are not comfortable and do not feel competent to make assessments of incapacity. Often the obtaining of the evaluation by one or more physicians is a difficult and lengthy process, thereby putting the principal's well being at risk in the meantime.
10. Powers of Attorney - Final Wishes. Ensure that final burial wishes are consistent in all documents. There is a website which is helpful: AgingwithDignity.com, "Five Wishes" National Advance Directive. Regarding the POLST (Physician Orders for Life Sustaining Treatment) - A fiduciary will often request that the attorney review a POLST prior to the client signing it to ensure that the final wishes correspond with the provisions in the Advance Health Care Directive. Recommend that clients file the Advance Health Care Directive with primary care physician, hospital, fire department AND inform family and neighbors of wishes. For use by EMTs, a copy on the refrigerator is recommended or a notation as to where the Advance Health Care Directive and/or POLST can quickly be located.
11. Powers of Attorney - Statutory vs. Non-Statutory Documents. Banks are regulated by the Federal government and as such do not always believe they need to adhere to the California Probate Code. The use of both statutory and non-statutory forms, as long as they are compatible legally, may save the family or professional fiduciary future headaches with banks.
12. All Estate Planning Documents Regarding Successors. Include at least two successors after the client or client's spouse - three is better.

Thank you to Lisa K. Hansen for sharing the above information with the members of LSI and, on a personal note, thank you for taking such good care of our clients who were in need of a professional fiduciary. **LS**



KRISTI L. EDWARDS, CCLS, has been a legal secretary for over 20 years. She is legal assistant and office manager for Burroughs and Froneberger in San Rafael, a transactional and estate law firm specializing in probate litigation and conservatorships. Currently serving as MCLPA president, she is an honorary member and has held all offices of Marin County Legal Professionals Association, along with many chair positions. She also serves LSI as Probate Section Leader.

A Section Leader Goes To Court

BY KRISTI L. EDWARDS, CCLS, PROBATE/ESTATE PLANNING SECTION LEADER 2014-2015

This article describes one of my experiences as the Probate/Estate Planning Section Leader for LSI and explains another benefit of being a Legal Specialization Section member.

The Marin County Probate Court, the Marin County Bar Association Probate Section, and interested members of the public, primarily private fiduciaries, met in early 2013 to discuss proposed changes to the Marin County Local Probate Rules. The proposed changes focused on fee declarations submitted by professional conservators and the attorneys who represent them.

The Court had proposed strict rules on billing procedures that would have imposed severe limitations on what these professionals could bill for their services. These changes had been set to go into effect on July 1, but the Court had received so many thoughtful comments, they scheduled a second meeting.

I was fortunate to attend both the initial and the follow-up meeting because I expressed the interest to do so, and my attorney, Henry D. Froneberger, is very supportive of my membership in Marin County LPA and my position as the Probate/Estate Planning Section Leader for the Legal Specialization Sections.

Bar members from the probate section and the professional fiduciaries were united in the opinion that these proposed rules would be so restrictive as to inhibit attorneys' ethical duties to represent their clients and would induce conservators to cut short their fiduciary duties to the conservatees because neither the attorneys nor the conservators would be paid for services they felt were required by their relationships. There were attorney/client privilege issues regarding attaching invoices to declarations and concerns that restricting the ability to charge for communication with the court investigators, for example, would chill the collaboration among the professionals charged with caring for these very vulnerable people – the conservatees. It was heartwarming to hear the passion and integrity all of these people bring to their work.

We entered the courtroom with Judge Verna Adams, Judge Faye D'Opal, the probate examiner, and the two Court investigators. We were all pleasantly surprised when the court announced they had already reconsidered the most severe proposals. It was fascinating to witness the discussion. The court considered how the professional fiduciary's job can start simply and rapidly become very complex as they become familiar with the conservatee's situation. Duties, that at first may seem routine and appropriate for clerical workers, after some investigation may become responsibilities that the professional should handle and be able to bill out at their professional rate. Billing can become a nightmare and separating each time entry into black and white categories is extremely time-consuming. The Court wanted more and more detail and description, but wanted to eliminate the ability to charge for the work necessary to comply. The fiduciaries expressed a willingness to be transparent within the limitations of time and costs.

I felt the Court really listened and wanted to make this work for everyone concerned. I was particularly proud to stand up and say that I very much appreciated the Court reiterating in the Local Rules the need for attorneys to include a statement in their fee declaration that their paralegal was in compliance with Business and Professions Code section 6450. I received quite a chuckle from the room when I said that the Court had just given me more ammunition to use in encouraging the Marin County Bar Association attorneys to support their staff's continuing legal education.

In the end, the Court maintained the rule that neither the professional fiduciary nor the attorney may charge the estate for making entries on timesheets, or charge the estate if required to clarify or explain billing entries to the Court. The Court clarified what are 'routine, non-professional services that cannot be charged at the professional's rate and rules about travel time. The new rules were adopted as of January 1, 2014.

I would encourage every LSI member to join at least one Legal Specialization Section and then approach their attorney and let them know that they are interested in attending the corresponding section at their local bar association. This has resulted in a very positive experience for me and for my attorney. If his schedule does not allow him to attend a Probate Section meeting, I can attend and return with the handout and the information imparted at the meeting. The attorneys who practice in this area and the court personnel now recognize me and we can put faces to the voices on the telephone or behind the emails. I keep the Marin County Bar Association Probate Section apprised of the LSI workshops and resources that may be

of benefit to them and their staff. I'm connected to the team that works in the probate arena and have another source of continuing education to help me meet the requirements of my position. It's all good!

Join a Legal Specialization Section now! Our membership year begins in August and you will find a current application form on the LSI website. Don't miss out on informative newsletters, high quality live seminars at each LSI conference, and our new webinars coming online in the upcoming year. **LS**



LEGAL SECRETARIES, INCORPORATED
CALIFORNIA CERTIFIED LEGAL SECRETARY
WORKSHOP REGISTRATION FORM
“Legal Terminology – LOPM Glossary”

First Quarterly Conference
California Embassy Suites, Sacramento, CA
Saturday, August 16, 2014, 7:30-8:30 a.m.
Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Is “parol” evidence really related to getting out of jail? Does “in loco parentis” really refer to “crazy” parents? Come test your knowledge of legal terminology at this workshop and find out what those terms really mean. To make it fun, we’ll turn it into a trivia game – just be sure to study the *Law Office Procedures Manual* Glossary before you come!

REGISTRATION DEADLINE: August 12, 2014

Name: _____ Email: _____
Address/City/State: _____
Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 3043 4th Ave., San Diego, CA 92103, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL BE GIVEN FOR THIS WORKSHOP



LEGAL SECRETARIES, INCORPORATED

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY

LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing October 20 and ending December 1, 2014. During the classes, the following topics will be covered:

Interrogatories
Demand for Production of Documents
Requests for Admissions
Depositions

Demand for Physical Examinations
Deposition Subpoenas
Discovery Timelines and Service
Verifications

CLASS SESSION OPENS MONDAY, OCTOBER 20, 2014

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$30 for LSI members/\$50 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate of completion from LSI.

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

(Please type or print clearly)

Name: _____ Email: _____
Address: _____ City/Zip: _____
Telephone: _____ Association: _____ LSA/LPA

\$30 LSI Member _____ \$50 Non-LSI Member _____

Payment: Check # _____
Visa/MC Credit Card # _____
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN October 13, 2014, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, training@lsi.org or mail to: LSI, P. O. Box 660, Fortuna, CA 95540-0660. Checks should be made payable to LSI (Note: checks must clear before access will be released). Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after October 20, 2014.

LSI – Educating California’s Legal Professionals



LEGAL SECRETARIES, INCORPORATED

BEGINNING LEGAL SECRETARIAL TRAINING CLASS

LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing September 15 and ending November 15, 2014. During the classes, the following topics will be covered:

Introduction to the Law Office
Duties of the Legal Secretary
Effective Telephone Skills
Effective Oral Communication Skills
Effective Written Communication Skills
Calendaring and Timetables
Basic Grammar Skills

Transcription and Proofreading Techniques
Court Structure
Citations
Service of Legal Documents
Preparation of Documents Filed with the Court
Basics of Civil Litigation

CLASS SESSION OPENS ON MONDAY, September 15, 2014

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The cost of the training class, which includes the Legal Secretary's Reference Guide, is \$150 for LSI members/\$200 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

Name: _____ Email: _____
Address/City/Zip: _____
Telephone: _____ Association: _____ **LSA/LPA**

\$150 LSI Member _____ \$200 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)
(Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)

Visa/MC Credit Card # _____
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN September 8, 2014, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, training@lsi.org or mail to: LSI, P. O. Box 660, Fortuna, CA 95540-0660. Registration will also be offered online at www.lsi.org with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email training@lsi.org. No refunds after September 15, 2014.

LSI – Educating California's Legal Professionals

Quarterly Assignments

THE FOLLOWING ASSOCIATIONS ARE EXPECTED TO SECURE ARTICLES FROM GUEST WRITERS FOR PUBLICATION IN THE MAGAZINE ISSUES SPECIFIED BELOW.

- a. AUGUST ISSUE (to be submitted no later than **June 1st**):
Alameda County, Beverly Hills/Century City, Butte County, Capitol City, Conejo Valley, Desert Palm, El Dorado County, Fresno County, Humboldt County, Imperial County
- b. NOVEMBER ISSUE (to be submitted no later than **September 1st**):
Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Mt. Diablo, Napa County, Orange County
- c. FEBRUARY ISSUE (to be submitted no later than **December 1st**):
Placer County, Redding, Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County
- d. MAY ISSUE (to be submitted no later than **March 1st**):
Santa Barbara, Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County, Ventura County

Dates to Remember in 2014

August 5, 2014	Deadline to register without late fee for Legal Specialization Seminars at August conference	September 15, 2014	LSI Training Class begins Beginning Legal Secretary
August 15-17, 2014	LSI First Quarterly Conference Embassy Suites, Sacramento Hosted by Sacramento LSA	September 18, 2014	Last day to submit CCLS Exam Application to the CCLS Certifying Board with payment of late fee
August 16, 2014	CCLS Workshop at August Conference Legal Terminology - LOPM Glossary	October 13, 2014	Last day to register for LSI on-line Discovery class
August 19, 2014	Last day to submit CCLS Exam Application to the CCLS Certifying Board	October 18, 2014	CCLS Exam Northern and Southern California locations
September 1, 2014	Deadline for submission of articles for November issue of The Legal Secretary	October 20, 2014	LSI on-line class begins Overview of California State Court Discovery
September 8, 2014	Last day to register for LSI Training class	November 7-9, 2014	LSI Second Quarterly Conference Hilton Palm Springs Hosted by Desert Palm LPA

Helpful Websites

Supreme Court of the United States
<http://www.supremecourt.us>

Office of the Attorney General
www.ag.ca.gov

California Courts
<http://www.courtinfo.ca.gov>

California Assn. of Legal Support Professionals
www.calspro.org

California Codes
<http://www.leginfo.ca.gov/calaw.html>

California State Bar
http://www.calbar.ca.gov/state/calbar/calbar_home.jsp

California Legislative Information
<http://www.leginfo.ca.gov>

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

Administrative Office of the U.S. Courts
<http://pacer.psc.uscourts.gov>

American Medical Association
<http://www.ama-assn.org>

American Association of Law Libraries
<http://www.aallnet.org>

National Notary Association
<http://www.nationalnotary.org/index.cfm>

California Secretary of State
www.sos.ca.gov

National Court Reporters Association
<http://www.ncraonline.org>

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, Jersey.



Sharing The Ideas And Solutions That Bind Us Together

BY CATHERINE CULVER, CCLS, LSI ADMINISTRATOR

Each quarter Legal Secretaries, Incorporated (LSI) officers and chairmen prepare directives to their local association counterpart. These directives are sent to local association presidents and governors to distribute to their appropriate officers or chairmen.

Why are directives sent? What is their point, and what is accomplished by using directives on which to base officer and chairmen reports? Directives are a method of gathering information on functions, activities, and operations at the local association level. In the case of Ways and Means, directives seek to obtain information on what sorts of fundraising ideas local associations have used, whether the fundraisers were successful, and most importantly, was the effort worth the reward. That's great information to have if the well has run dry of fundraising ideas. In the case of the President's Directive, local association presidents were recently asked what new improvements would they like LSI to work on in the 2014-15 year. Wow, a chance to make suggestions to help guide the organization. Want to know about the various LSI Scholarships? Read the Career Promotion/Scholarship Reports.

When the directive responses are received by the LSI officers and chairmen, those individuals collate the information into reports. As of May 2014, LSI members have the ability to view all of the most recent reports, and all reports by quarter, going back to February 2013. If you want to read nothing but Membership Reports, you may do so. Reports track the months of LSI Board of Governors meetings: August, November, February, and May.

LSI posts all of the directives on the website at the time directives are due from the officers and chairmen to the Administrator. The Administrator works hard to see that all of the reports are posted one week prior to conferences so that the general membership (or local officers and chairmen who did not receive their report), may read the reports or download them to view at their convenience. That is

why it is so important for officers and chairmen charged with issuing directives and writing reports to submit them in a timely manner to corporate office.

The directives and reports are available to LSI members only (you are an LSI member if you have paid dues to a local association, or are a member-at-large), at http://www.lsi.org/directives_reports.php. The password to the members-only section of the website changed in June. If you need it, ask your President, Governor, Treasurer, or email the Administrator at lsiorg@suddenlinkmail.com.

If you have an idea for a question on a particular directive, let the officer or chairman in charge of that directive know. If you are curious about something, it is likely other members are as well. Your question may not be used immediately, but in time it may be topical and important.

Legal Secretarial Training Chair Shaylene Cortez, CCLS, used Survey Monkey to gather answers to her directives. In her May 2014 report, Ms. Cortez mentioned that for \$228 per year, all LSI Chairmen could use Survey Monkey for their directives, and receipt of answers sent is confirmed. If this is something that appeals to you, speak to your governor about it. Governors are the ones who run LSI, and if enough governors agree, LSI may adopt Survey Monkey for its directives.

Reports are the way that LSI shares among its chartered local associations the ideas and solutions that help us succeed, and bind us together under the LSI umbrella.

LS

California Certified Legal Secretary

A Program of
Legal Secretaries, Incorporated



APPLICATION

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

CCLS Certifying Board
14403 Leibacher Avenue
Norwalk, CA 90650

(Select One)		(Select One)
<input type="checkbox"/> Northern California		<input type="checkbox"/> Saturday, October 18, 2014
<input type="checkbox"/> Southern California		<input type="checkbox"/> Saturday, March 21, 2015

Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, if space is available. Deferral requests must be made no later than 2 weeks prior to the exam.

EXAMINATION FEES*			
	LSI MEMBERS**		Non-LSI MEMBERS
	Registration fee: \$ 25.00		Registration fee: \$ 75.00
	Examination fee: <u>\$ 100.00</u>		Examination fee: <u>\$ 100.00</u>
	Total \$125.00		Total \$175.00

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

* Fees subject to change without notice.

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

*** Include \$30 late fee if applicable.

Name: _____ Last 4 Digits of SSN: _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____ Email: _____

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

Dates: _____ Position: _____

Employer: _____

Address: _____

Supervisor: _____ Phone: _____

Summary of Duties: _____

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

Signature of Applicant: _____ Date: _____

Rev. Mar. 2014

CYNDEE SAUCEDA, CCLS, is a member of Alameda County LSA and is currently serving as President. She recently passed the CCLS exam. She has been with her current employer, Meyers Nave Riback Silver & Wilson in Oakland, for ten years, working in Land Use, Writs and Appeals.



Taking The CCLS Exam

BY CYNDEE SAUCEDA, CCLS, ALAMEDA COUNTY LSA

Taking the California Certified Legal Secretary Exam, or CCLS® as it is more affectionately known among legal secretaries, is a step to improving your knowledge of California legal practice and procedure and broadening your opportunities for job advancement. The CCLS Exam is given two times a year. To take the exam, a minimum of two years' legal experience is required. The exam consists of seven sections, covering subject areas from ability to communicate effectively to legal terminology and skills.



Most people preparing for this test become nervous because not everyone works in all areas of the law covered. Of course, it helps to prepare prior to taking the CCLS exam by participating in a study group or the CCLS online course sponsored by LSI. If you are dedicated you can study on your own by using the Gregg Reference Manual, the Law Office Procedures Manual, and the California Style Manual.

Some general test taking tips might help you. The test is all multiple choice questions, so if you are not sure of the right answer, try subtracting the answers you know are not correct. That may leave you with an easier, clearer choice. Also, trust your instincts. More often than not, your first answer will be the right answer.

I have worked in the legal field for over 15 years and I am always trying to learn more. This field is constantly changing, and although I have been with my firm for over ten years, it never hurts to keep an updated resume. I decided to take the CCLS exam just to see whether I could pass. I took the online study course and it helped me to stay focused on the areas I was not familiar with. I did not study for long hours or constantly think about the test. I just showed up for class every week and did the homework. I work in litigation so I think that helped. When I showed up for my test I was pleasantly surprised at how quickly I made it through each section. My confidence levels increased with each section I took.

When I finished the exam, I had some doubts about how I did, but I figured what was done was done. I received my results a few weeks later and I passed. I was more than happy to tell everyone. I was really excited to be able to say I had passed and on my first try, too!

The CCLS exam should not be intimidating or frightening. After all, the worst that can happen is you do not pass. You can still sign up to take the test again, and if you pass at least four sections, you only need to re-take the sections you did not pass. And remember what it's all for. All the classes and studying have given you the skills, knowledge, and confidence to become a better Legal Secretary, and open the doors to life-long job security, good wages, an exciting work environment, and the satisfaction of helping others and knowing that your chosen career makes a real and significant difference to the attorneys and clients with whom you are working. **LS**

QUIZ ANSWERS FROM P.3:

- | | | |
|------|-------|-------|
| 1. B | 6. B | 11. B |
| 2. A | 7. A | 12. A |
| 3. B | 8. B | 13. A |
| 4. A | 9. A | 14. B |
| 5. B | 10. A | 15. B |



LEGAL SPECIALIZATION SECTION SEMINARS
LSI Annual Conference – May 15-18, 2014 – Concord Hilton
Hosting Association: Mt. Diablo LPA



REGISTRATION FORM - DEADLINE IS Monday, May 5, 2014

Registration **MUST** be **RECEIVED** by the LSS Coordinator **on or before the deadline.**

Please make advance reservations so materials may be prepared. Please check all appropriate boxes below.

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
Friday, May 16, 2014 – 1:30 to 3:30 p.m.		
<u>CRIMINAL LAW:</u> Topic: "Immigration Consequences of a Criminal Conviction; What's Important to Know About Clients and Their Stories" Speaker: Daniel L. Barton of Nolan, Armstrong & Barton and Zachary M. Nightingale of Van Der Hout, Brigagliano & Nightingale. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>FAMILY LAW:</u> Topic: "Collaborative Divorce – Meet the Team" Speaker: Emily DeFalla, Esq. and a Mental Health Professional <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Friday, May 16, 2014 – 4:00 to 6:00 p.m.		
<u>CIVIL LITIGATION:</u> Topic: "Racing Against Time - Discovery and Motion Calendar Procedures for Superior Court Cases" Speaker: Brenda Thomas Wilson, J.D. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>TRANSACTIONAL LAW:</u> Topic: "Limited Liability Company vs. Incorporation" Speaker: TBA <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, May 17, 2014 – 4:00 to 6:00 p.m.		
<u>LAW OFFICE ADMINISTRATION:</u> Topic: "Employment Law Updates – 2014" Speaker: Jeanine DeBacker, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>PROBATE/ESTATE PLANNING:</u> Topic: "Conservatorships - Serving Clients and Collecting Fees" Speaker: Scott Poling, Esq.; Pat McVey-Ritsick, CLPF, NCG, Licensed Fiduciary; and Kristi L. Edwards, CCLS, Probate Paralegal <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

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

Address/City/State: _____

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

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

Name on Credit Card: _____ Type of Card: Visa _____ M/C _____ Card Verification No: _____

Mail, Fax, or Email completed form to:

Cheryl L. Kent, PLS, CCLS, LSS Coordinator
 P. O. Box 12082, Pleasanton, CA 94588
 925-523-3086 (fax) ~ clkcls@comcast.net

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

PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"

Speakers and Topics are Subject to Change

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

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.75 hours each, by the State Bar of California.

2013-2014 Legal Specialization Section Leaders:

Civil Litigation: Dawn R. Forgeur, CCLS drforgeur@stoel.com Criminal Law: Jill Gardella jgardella@nablaw.com Family Law: Mary Lou Floyd, CCLS, M.S. Louloux7@yahoo.com	Law Office Administration: Tammy L. Hunt, CCLS loaleader@tlhunt.org Probate/Estate Planning: Kristi L. Edwards, CCLS kledwards@justice.com Transactional Law: Lisa De La O ldelao@fitcheven.com
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Contest Winners

History Book Competition

- Class A (0-15 members) - no entries
- Class B (16-30 members) - no entries
- Class C (31-45 members)
- First Place: Stanislaus County LPA - Historian Janice Schmidt
- Second Place: Merced County LPA - Historian Gai Brajkovich, CCLS
- Class D (46-65 members) - no entries
- Class E (66-150 members)
- Orange County LSA Historian Heather Nowak
- Class F (over 150 members)
- San Diego LSA Historian Judy Johns, CCLS

Scrapbook Competition

- First Place San Gabriel Valley LSA - Historian Anna Maria Dukeslaw
- Second Place Santa Clara County LPA - Historian Elena K. Schneider, CCLS
- Third Place San Francisco LPA - Historians Frances L. Skaggs & Larry McGrew
- Fourth Place Conejo Valley LPA - Historian Jack-Lynn Sawyer, CCLS

Members' Choice Award

- History Book: San Diego LPA - Historian Judy Johns, CCLS
- Scrapbook: San Gabriel Valley LPA - Historian Anna Maria Dukeslaw

Membership Gain Contest

- Group A (0-15 members): Napa County LSA
- Group B (16-30 members): El Dorado County LPA
- Group C (31-45 members): Imperial County LPA
- Group D (46-65 members): Mt. Diablo LPA
- Group E (66 - 150 members): San Francisco LPA
- Group D (over 150 members): Sacramento LSA

Scholarship Winners

PLAN A – HIGH SCHOOL SENIOR

- 1st Place Guadalupe Sanchez
Sponsoring Association: San Diego LSA
- 2nd Place Anoli Kothari
Sponsoring Association: Sacramento LSA

PLAN B – COLLEGE STUDENT

- 1st Place Yvette Conklin Sponsoring Association: San Diego LSA
- 2nd Place Natasha Wentzel Sponsoring Association: Stockton-San Joaquin County LPA
- 1st Alternate Tracy Corley Sponsoring Association: Los Angeles LSA
- 2nd Alternate Josephine Ramirez Sponsoring Association: Santa Clara County LPA

PLAN C – CAREER CHANGE

- 1st Place Marilynne Valois Sponsoring Association: San Mateo County LSA
- 2nd Place Suzie Gulshan Sponsoring Association: Orange County LSA
- 1st alternate Sylvia Rathel Sponsoring Association: Los Angeles LSA
- 2nd alternate Nicole Shaw Sponsoring Association: Stockton-San Joaquin County LPA





JUSTICE STEVEN M. VARTABEDIAN (RET.) is a former justice of the California Fifth District Court of Appeal and has been with Dowling Aaron Incorporated's ADR and Appellate Practice Groups since June 2010 following 29 years of judicial experience.

Does Order For A Medical Reevaluation Of An Employee After She Has Returned To Work Following Family Medical Leave Act Leave Violate Her FMLA Rights?

BY JUSTICE STEVEN VARTABEDIAN (RET.), FRESNO COUNTY LPA

In *White v. County of Los Angeles* (filed 4/15/14) 2014 DJDAR 4726, White took FMLA leave from her position of district attorney's office investigator as a result of emotional/medication difficulties she experienced. Her psychiatrist certified her condition, which was expected to hospitalize her for 2 weeks, followed by 2 weeks of outpatient care plus possibly more time before she would be able to return to work. FMLA entitles an employee to a total of 12 workweeks of unpaid leave because of a serious health condition. The 12 weeks expired at a time when White was still being treated, causing her psychiatrist to request an additional 4 and 1/2 weeks. White then returned to work with the approval of her examining psychiatrist; 4 months later, the County ordered her to appear to be reevaluated by a County doctor. She failed to appear, believing that such an examination violated her rights under FMLA. She was disciplined for insubordination. She sought injunctive relief to prevent the medical reevaluation.

The trial court issued a writ of mandate permanently enjoining the County from requiring a medical examination based on White's conduct prior to her return to work. While an employer would be legally permitted to order a medical reevaluation *after* her return to work, reasoned the court, it could not challenge her doctor's certification

that she was fit to return from FMLA leave. The Court of Appeal, Second Appellate District, Division Three, disagreed, finding that, once an employee is restored to work, an employer may seek, at its own cost, evaluation of the employee's fitness for duty.

Key to the ruling of the appellate court are the 2008 comments of the United States Department of Labor clarifying the interplay between the FMLA and Americans with Disabilities Act (ADA): "[I]f an employer is concerned with the health care provider's fitness for duty certification, the employer may, consistent with the ADA, require a medical exam at the employer's expense after the employee has returned to work from FMLA leave. . ." (73 Fed. Reg. 67934-01, 68033.)

The Court of Appeal went on to note this right of the employer is particularly applicable to this case, where the employee is a peace officer, who carries a weapon. Government Code section 1031 makes it clear that peace officers must remain clear of physical, emotional or mental conditions that might adversely affect their exercise of powers as a peace officer; the statute provides for psychological evaluation to determine such fitness.

Because the court does not limit this ruling to law enforcement employment, its holding would appear to



apply more broadly. An employer still needs to understand the distinction between the impermissibility of *conditioning* an employee's return to work on its own evaluation; versus first allowing the return to work based on the employee's physician's certification, then requiring a fitness examination. And that fitness examination need not relate only to any new developments since the employee's return. In the present case, the County seems to have adequately protected public safety concerns by placing White on paid administrative leave upon her return to work, until it could get its own reevaluation.

The information contained in this article is provided for informational purposes only, and should not be construed as legal advice on any subject matter. No one should act or refrain from acting on the basis of any content included in this article without seeking the appropriate legal or other professional advice on the particular facts and circumstances at issue from an attorney licensed in the recipient's state. The content of this article contains general information and may not reflect current legal developments, verdicts or settlements. Justice Vartabedian and Dowl-ing Aaron Incorporated expressly disclaim all liability in respect to actions taken or not taken based on any or all of the contents of this article.

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7. Networking provides a forum for the exchange of information.
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For more information, contact Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator. Office: (925) 837-0585; Email: clkcls@comcast.net

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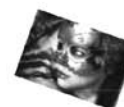
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LAW OFFICE PROCEDURES MANUAL

FOR CALIFORNIA LAW PRACTICE

compiled by Legal Secretaries, Incorporated
published by The Rutter Group



THE IDEAL TRAINING MANUAL FOR NEW STAFF! QUICK REFERENCE FOR EXPERIENCED STAFF!

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

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1 Volume

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ASTRID B. WATTERSON, CCLS, is currently LSI's Parliamentarian and is a member and the Parliamentarian for Sacramento LSA. She has been a paralegal for over 11 years. Her areas of specialty are environmental law and litigation. This is her ninth year serving on the Sacramento LSA Executive Board as either Secretary (2004-2005), President (2005-2007; 2010-2011), Governor (2007-2008), or Parliamentarian (2011-present).



DAWN R. FORGEUR, CCLS, is LSI's Legal Specialization Section Coordinator and is also a member of Sacramento LSA, acting as its Executive Advisor. Her area of expertise is in civil litigation and she has been in the legal field for over 10 years. She was President of Sacramento LSA from 2011-2013 and has also previously served as SLSA's Governor from 2010-2011.



Come To Sacramento And "Let The Good Times Roll!"

BY ASTRID B. WATTERSON, CCLS AND DAWN R. FORGEUR, CCLS

Sacramento Legal Secretaries Association will host LSI's 1st Quarterly Conference on August 15-17, 2014, in Sacramento, California. Over the course of the weekend, we will be celebrating Mardi Gras, a theme that will emphasize the excitement and merriment of being with your peers in August while in Sacramento!

Mardi Gras is a symbol of celebration and enjoyment, which is exactly what we want for all of our guests. While the weekend is packed with meetings and many opportunities to network with your colleagues, the location also allows for you to be able to take a walk and enjoy the town. Our goal is to make sure that at the end of conference, you walk away with a joyful smile, a memorable experience, and most of all, an educational weekend.

The conference will be held at the Embassy Suites Sacramento – Riverfront Promenade. The hotel is located across the street from Old Sacramento, which is a historic eight-block section of Downtown Sacramento and features various restaurants, local business shops for items such as sweets, toys and games, jewelry, art, antiques, collectibles, and various other accessories. The hotel is also near several other restaurants that are open for lunch and dinner, and many for after-hour entertainment – including a comedy club! The hotel does offer a free shuttle to pick you up from the airport, but it only holds nine people at a time. To see if the shuttle is available to pick you up from the airport, please call the hotel at 916-326-5000 as soon as you land!

Sacramento has a lot to offer to all guests. When you are not in a business meeting, you can always go to a baseball game or reserve your spot to take an Underground Tour of Old Sacramento or perhaps a train ride at the California State Railroad Museum's popular excursion – the Sacramento Southern Railroad.

The Embassy Suites room rate for conference weekend is \$144 for single/double and all of the rooms feature suites with separate living and sleeping areas, complete with sofa bed, armchair, and a microwave. In addition to the sleeping accommodations, the Embassy Suites offers a complimentary breakfast bar for all guests.

Friday evening we begin the celebration with a bit of entertainment and mingling with our vendor supporters. Throughout the weekend, you will see the merriment of Mardi Gras shine through either in music, color, or simply by having a good time. Collect beads, make your masks, smile and laugh, the order of it all doesn't matter so long as you simply enjoy your adventure in Sacramento.

Saturday night's banquet will be a formal affair and perhaps "masked" by a bit a mystery. We ask that all participants come dressed to show off their sparkles. The brighter – the better! If you need to, you can always bedazzle an outfit and make it new again!

Let's not forget to take advantage of all of the educational opportunities that are being offered throughout conference. However, if you have met your educational goals for the weekend and want to catch a game, the Sacramento River Cats will be playing against the Colorado Springs on Friday, August 15 at 7:05 p.m. and again on Saturday, August 16 at 7:05 p.m., they will play against Oklahoma City. Even if you aren't able to catch the game, you will get to enjoy the fireworks show immediately after from the hotel's waterfront.

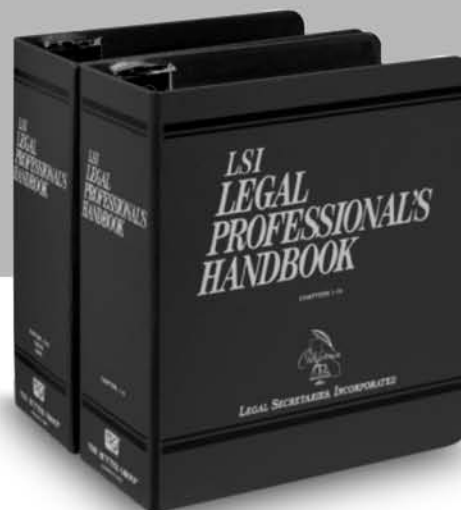
As you can see, Sacramento LSA is looking forward to hosting the LSI's 1st Quarterly Conference in August. Remember, it will be warm in August – so come on and visit us for the weekend. Get your educational credits, participate in the various educational and networking opportunities, enjoy yourself, and if you have time, get out and see the town, shop, dine, take a train ride or catch a baseball game. Whatever you choose, we hope you leave with a smile on your face!

Should you have any questions about the conference, you may contact the conference chairs Dawn Forgeur, CCLS at drforgeur@stoel.com or Astrid Watterson, CCLS at astrid.watterson@gmail.com.

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LEGAL PROFESSIONAL'S HANDBOOK FOR CALIFORNIA LAW PRACTICE

compiled by Legal Secretaries, Incorporated
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LSI Marketing Committee Coordinator
PO Box 150427, San Rafael, CA 94915
Home - (415) 989-1010
Cell - (415) 710-3402
jlpage@ix.netcom.com
jlpage@mc.com



2014 LSI Roster



ELECTED OFFICERS

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E-mail: marybeau59@att.net

Vice President
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Cell: 415-710-3402; Home: 415-898-1010
E-mail: jlpagel@ix.netcom.com

Executive Secretary
HEATHER EDWARDS
Cell: 818-632-6647; Work: 818-827-5159
E-mail: heatheredwardslsi@aol.com
or hedwards@alpertbarr.com

Treasurer
LYNNE KOROUGH
Cell: 916-398-0120; Work: 916-551-3360
E-mail: slprescott7@gmail.com

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E-mail: astrid.watterson@gmail.com

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