

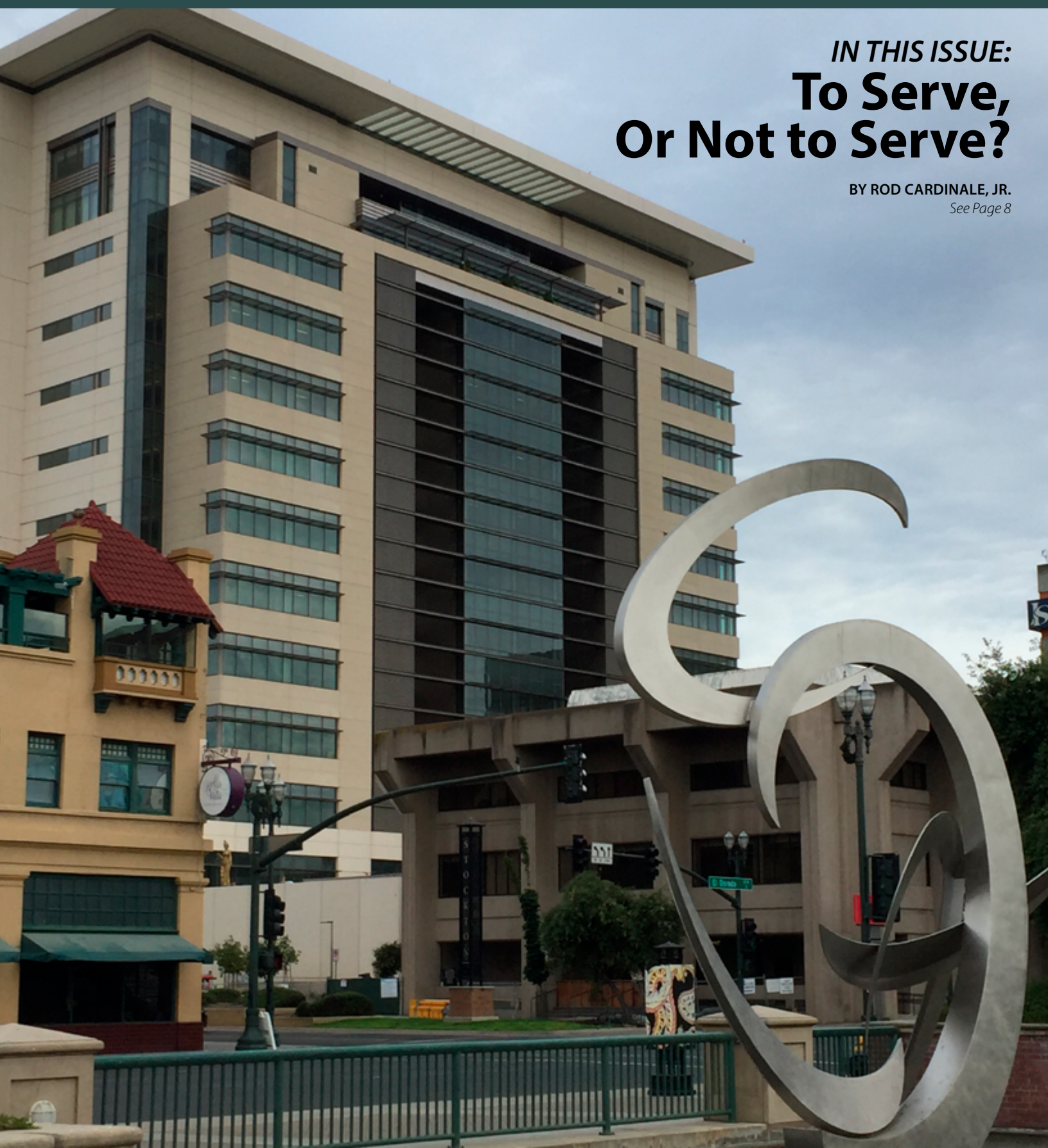
THE Legal Secretary®



AUGUST 2017

IN THIS ISSUE: **To Serve, Or Not to Serve?**

BY ROD CARDINALE, JR.
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— Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

THE LEGAL SECRETARY MAGAZINE

is published Quarterly by Legal Secretaries, Incorporated

Editor: BARBARA BARREGAR

Designer: LORI MCELROY, REDROMAN CREATIVE

Printer: L&L PRINTERS

Cover Photo: New San Joaquin County Courthouse
slated to open in late July. Photo provided by Colleen Young.

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President's Message

BY JENNIFER L. PAGE, CCLS, LSI PRESIDENT



JENNIFER L. PAGE, CCLS has been in the legal field since 1989, starting out as a legal secretary to a bankruptcy attorney. She obtained her Paralegal Certification from St. Mary's College, Orinda, CA in 1991. In 2012 Jennifer joined the firm Ragghianti Freitas LLP embarking on the next adventure in her legal career working for five partners of the firm and learning new areas of law.

Jennifer has been a member of Marin County LPA since 1990; has held virtually every officer and chairmanship position. Marin County LPA presented her with Honorary Life Member status in 2001. Jennifer began serving LSI in 1999 when she was appointed as the Legal Procedure Chair and continued to serve LSI until she was elected Treasurer in 2010. In May 2008, President Lorraine Bettencourt, PLS, CCLS, presented Jennifer with the President's Award.

Jennifer obtained her CCLS designation in October 2008.

Jennifer resides in Novato, California with her husband of 20 years Tony, their 15 year old daughter Emma and Midnight the cat.

While the tagline for LSI is "Educating California's Legal Support Professionals" and our motto is "Excellence through Education," LSI is dedicated to educating legal secretaries and promoting high ethical standards among law office support staff in the legal community. At the core of LSI are the volunteers. Those appointed officers and chairmen who have accepted a position to serve LSI. Sacrificing time with family, friends, and time at work, these volunteers are dedicated to all that LSI has to offer. I want to take a moment to again thank every appointed officer and chairman who has agreed to serve LSI this coming fiscal year. These dedicated members give of their time to ensure that LSI is meeting its goals each and every quarter by continuing to offer support, networking and education to each and every member of LSI and the legal community. THANK YOU!

Annual Conference is one of my favorite conferences to attend. It is a time to celebrate all that was accomplished the previous year. And celebrate we did. With the help of the members of Stanislaus County LPA, led by Chair Diane M. Mecca, CP, CBA, LSI cruised into Modesto for four days of fun, education, networking and celebration! The various committees met on Thursday to review the previous year and set in motion plans for the upcoming fiscal year. On Friday, we had the Officer/Chairmen workshops along with the President's Roundtable. For the first time, we offered a workshop on "Serving LSI" and I am happy to say that we had 18 attendees plus four members of the current Executive Committee and a Past President in attendance. The past few years we have only had one candidate running for the office of Treasurer. Based on the attendance at this workshop and the interest expressed, I am very hopeful that we will have more than one candidate running for office next year.

Events continued on Friday with the Presidents, Newcomers and Governors Luncheons and we finished off with four LSS workshops and the Welcome Reception. Saturday brought us the Pre-Board of Governors' meeting and on to the General Assembly where we heard reports of all officers and chairmen, elected the 2017-2018 Officers and celebrated those who passed the CCLS exam this past fiscal year at the Kalman S. Zemplyny II CCLS Luncheon. On Saturday evening everyone came in their finery for the Banquet where those who passed the CCLS exam this past fiscal year received their CCLS Certificates, the winners of the Golda J. Cooper Chapter Achievement Contest were announced and I was honored to present the President's Award to a very deserving recipient, Diane M. Mecca, CP, CBA. Diane is the true embodiment of a volunteer and she so deserved to receive this award.

Sunday brought the installation of officers, announcement of the 2017-2018 Appointed Officers and Chairmen, and various presentations were made. We finished off with the Post-Board of Governors meeting where I was pleased to announce bids received and accepted for upcoming conferences. I am very happy to report that all upcoming conferences through August 2019 will be hosted by a local association!

PRESIDENT'S MESSAGE

At the Annual Conference the Governors voted to change the LSS fiscal year to coincide with the LSI fiscal year. There was mention that the EC may be making a recommendation to increase per capita. With expenses increasing, this may be a necessary recommendation. The EC does not take this decision lightly but all options will be carefully reviewed before any recommendation is made. On a historical note, the last time per capita was increased was in 2004. We also heard the report of the Ad Hoc Committee appointed to research the possibility of adding a student membership category on the state level. The committee provided a very thorough and extensive report along with three recommendations. Those recommendations will be put to the Governors for vote at the August Quarterly conference. In the interim, I encourage you to request a copy of the report from your Governor and be on the lookout for the Notice of Proposed Bylaw Amendments. Review the report and the proposed amendments and please discuss these very important proposals with your membership so that your Governor will be well informed and ready for the vote. We are also

looking to outsource our Beginning Legal Secretary classes and adding a Legal Specialization Section Leader to handle all aspects of presenting webinars for LSI. These are very important items for LSI to implement – having an online presence is clearly the next step we need to look to, to have a continued presence in the legal community. Yes, nothing can replace face-to-face interaction but people's lives are so busy, and the need for education continues to be there, we must figure out a way to keep relevant and meet the ever-evolving needs of the legal community and our members.

I am excited for the future of LSI, and a bit apprehensive. But with the appointed officers and chairmen serving LSI, I do believe we will figure out how to keep current and relevant and increase our membership and presence in the legal community.

Looking to the future, our next conference will be the First Quarterly Conference in August hosted by Stockton-San Joaquin County LPA on August 18-20, 2017, at the Hilton Hotel in Stockton, California. I hope to see many of you there!

LS



LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM

“SKILLS”

First Quarterly Conference
Stockton Hilton, Stockton, CA

Saturday, August 19, 2017, 7:30-8:30 a.m.

Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Skills is the hardest, yet easiest section of the CCLS exam. It's all about technique, time management, and being organized. At this workshop we will do a timed exercise, then review tips and tricks to getting through the section, then will do another exercise once you know how to get through the section quickly and efficiently. Come to this workshop and learn how to beat Skills!

REGISTRATION DEADLINE: August 14, 2017

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, 101 W. Broadway, Ste. 1700, San Diego, CA 92101, and email registration to quinton@dsmw.com.

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JENNIFER L. PAGE, CCLS



Vice President
HEATHER EDWARDS



Executive Secretary
LYNNE PRESCOTT, CCLS



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ROD CARDINALE, JR.

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Parliamentarian
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Chairmen



2018 Annual Conference Co-Chair
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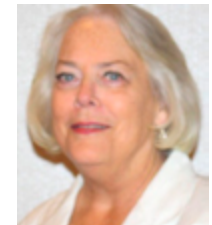
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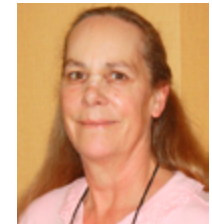
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KIM OREND

LSI OFFICERS
&
CHAIRMEN

2017/18

2016/17 CONTEST WINNERS

MEMBERSHIP GAIN WINNERS:

GROUP A

Southern Butte County LPA - (22% Gain)

GROUP B

Contra Costa County LPA - (130% Gain)

GROUP C

Alameda County LSA - (32% Gain)

GROUP D

San Fernando Valley LSA (72% Gain)

GROUP E

Fresno County LPA (94% Gain)

GROUP F

Sacramento LSA (41% Gain)

CHAPTER ACHIEVEMENT CONTEST WINNERS:

GROUP A

Conejo Valley LPA (13,050 Points)

GROUP B

Placer County LPA (13,300 Points)

GROUP C

Stanislaus County LPA (37,275 Points)

GROUP D

San Fernando Valley LSA (33,225 Points)

GROUP E

Santa Clara County LPA (43,550 Points)

GROUP F

San Diego LSA (52,750 Points)

EULA MAE JETT SCHOLARSHIP WINNERS

PLAN A – HIGH SCHOOL SENIOR

1st Place - \$2,000

Priscilla Fernandez

Sponsoring Association:

Stanislaus County LPA

2nd Place - \$1,000

Megan Elmore

Sponsoring Association:

Orange County LSA

1st Alternate

Savannah Jo Vasquez

Sponsoring Association:

Alameda County LSA

PLAN B – COLLEGE STUDENT

1st Place - \$2,000

Kristin McElderry

Sponsoring Association:

Los Angeles LSA

2nd Place - \$1,000

Eddie Horalek

Sponsoring Association:

Alameda County LSA

PLAN C – CAREER CHANGE

1st Place - \$2,000

Gina Gutierrez

Sponsoring Association:

San Francisco LPA

2nd Place - \$1,000

Pan Yen

Sponsoring Association:

Los Angeles LSA

1st alternate

Joyce Jardell

Sponsoring Association:

Orange County LSA

2nd alternate

Junior Mayema

Sponsoring Association:

Alameda County LSA

BULLETIN CONTEST WINNERS

CLASS A:

1st Place: San Gabriel Valley LSA

2nd Place: Conejo Valley LPA

CLASS B:

1st Place: Stockton-San Joaquin
County LPA

CLASS C:

1st Place: Alameda County LSA

2nd Place: Merced County LPA

CLASS D:

None

CLASS E:

1st Place: San Francisco LPA

2nd Place: Los Angeles LSA

3rd Place: Santa Clara County LPA

CLASS F:

1st Place: Sacramento LSA



CONGRATULATIONS!

CONGRATULATIONS TO LSI'S NEWEST
CALIFORNIA CERTIFIED LEGAL SECRETARIES!

**THE FOLLOWING INDIVIDUALS ARE TO BE RECOGNIZED AND COMMENDED
FOR PASSING THE CCLS EXAM DURING THE 2016-2017 YEAR:**

Theresa M. Burge, CCLS	San Diego LSA
Rita Burnett, CCLS	Los Angeles LSA
Denise Bracamonte, CCLS	Imperial County LPA
Carolyn Charlton, CCLS	Los Angeles LSA
Janine Durkin, CCLS	Non LSI-Member
Renee Evans, CCLS	San Diego LSA
Alessandra Ferris, CCLS	Non LSI-Member
Christina Hall, CCLS	Santa Clara County LPA
Vanessa Hobdy, CCLS	Los Angeles LSA
Jeanette Kerr, CCLS	Non-LSI Member
Kiwi Le, CCLS	Santa Clara County LPA
Martha Mota, CCLS	Los Angeles LSA
Anna Olsen, CCLS	Non-LSI Member
Michelle Perez-Consuegra, CCLS	Los Angeles LSA

*Passing the CCLS examination is a tremendous achievement
and these new CCLSs deserve kudos for rising to the challenge and proving that
hard work, dedication, and commitment can lead to fantastic results!*

CONGRATULATIONS!



ROD CARDINALE, JR has been in the legal field since 2008. He obtained his Paralegal Certification from Evergreen Valley College, San Jose, CA in 2009. In 2014, Rod joined the Law Office of Janet L. Brewer as Paralegal and Office Manager. Rod has been a member of Santa Clara County LPA since 2009; serving as President from 2010-2014 and is currently serving as Executive Advisor. Rod began serving LSI in 2011 when he was appointed as the Legal Procedure Chair. In May 2012, President Brooke Mansfield, presented Rod with the “LSI President’s Award” and continued to serve LSI until he was elected Treasurer in 2016. Rod resides in Santa Clara, California with his wife, Tina, and their three children Alyssa, Anthony and Dominic.

To Serve, Or Not To Serve?

BY ROD CARDINALE, JR., LSI TREASURER

To serve, or not to serve.... Have you ever thought about running for LSI Office, or putting your name in for a chairmanship, but you just couldn’t get yourself to take the chance? I know exactly how you feel! Putting my name out there, especially being one of only a couple of men in a group of women, to be a chairman and then running for and ultimately serving as an officer of our great corporation, were not easy decisions. If you take the chance, it has the potential to have a great impact on you and your life. I want to share my experiences in serving as a chairman, and running for, and serving as, LSI Treasurer in the hopes you will take the chance to challenge yourself, possibly step out of your comfort zone and serve LSI.



My LSI journey began in May of 2010, at my first conference, which was held in Sacramento. Before I attended my first conference, I decided to join my local association. In July of 2009, I took the advice of one of my paralegal professors and joined Santa Clara County Legal Professionals Association (“SCCoLPA”) and was elected and installed as its first male President in May of 2010. I was encouraged to attend conference by my professor and our then outgoing President, Chavez. I was a little reluctant to attend the conference, as I was afraid of the unknown, but took a chance, attended and haven’t missed a conference since. At the conclusion of that conference, I mentioned to SCCoLPA’s newly-installed Governor, Elise Dresser, CCLS (“Elise”), that I had such a good time and I was so energized to go back to SCCoLPA and get to work.

In early 2011, LSI President, Brooke Mansfield, CCLS (2010-2012) (“President Brooke”) asked me if I would consider completing the term for the Legal Procedure Chair, who had to step down. After taking time to think about it and consulting with my family, I ultimately decided to step out of my comfort zone and accept the challenge. I would serve in my first LSI capacity, the

remainder of the 2010-2012 term as Legal Procedure Chair and member of the Continuing Education Council (“CEC”). In early 2012, I was again approached by President Brooke. This time, she wanted me to serve as Assistant Registrar of Delegates at the May 2011 Annual Conference, along with Elise, the 2011 Annual Conference Registrar of Delegates.

After attending my first LSI conference, in May of 2010, I mentioned to Elise that SCCoLPA needed to host a conference and I wanted to be the Conference Chairman. Without hesitation, Elise agreed and we began work on trying to host the best conference ever. At the February 2011 Quarterly Conference, our bid to host the 2013 Annual Conference was accepted and I was appointed the Conference Chairman.

In early 2014, incoming LSI President, Mary Beaudrow, CCLS (“President Mary”) asked me to consider serving as LSI’s Social Media Chairman. I was privately considering running for LSI Treasurer after receiving encouragement from other LSI members who thought I would be a good addition to the Executive Committee (“EC”). I was very conflicted over my belief that I could be an asset to the

EC and the time commitment that it would take and who would be affected by this decision. I have a full time job as a Senior Paralegal and Office Manager, a wife, three children, serve as SCCoLPA's Executive Advisor, and have my own interests. Where would I find the time? Who would feel I was spending less time with them? All hard decisions that were bigger and more far-reaching than just me. I ultimately decided I couldn't give all that the position of LSI Treasurer would require and I accepted President Mary's call to serve as LSI's Social Media Chair and Member of the Marketing Committee. This turned out to be a great decision, as I really enjoyed my position and being a member of the Marketing Committee.

Fast forward to early 2016. Incoming LSI President, Jennifer L. Page, CCLS ("President Jennifer") asked me to consider continuing on as Social Media Chairman. I was again privately considering a run for LSI Treasurer. I found myself in the same conundrum as in 2014 -- should I run or not? My kids were all a couple years older and I felt like I was in a better place to run than I was in 2014, but again, was not sure I could give 100% to the job, so I accepted President Jennifer's call to continue on as Social Media Chair and Member of the Marketing Committee.

At the 2016 Annual Conference, LSI would find itself in a bit of a pickle, as no one had stepped up to run for LSI Treasurer. I went home and shared with my wife, other members of SCCoLPA and LSI that I had twice considered running for Treasurer, but ultimately decided it wasn't the right time for me. What I learned from those conversations was they would support me if I decided to run for the vacant position. After about a month of going back and forth, and armed with the support of those around me, I finally decided that there likely would never be the "perfect time" for me to run for LSI Treasurer, and I submitted my name for consideration for the office of Treasurer. In August of 2016, I was installed as LSI Treasurer and the first elected male officer in LSI's 82-year history.

I'll admit, the job was pretty overwhelming the first month or so as LSI Treasurer. I spent a good amount of time getting to know the policies, procedures and duties of the Treasurer, while trying to keep up with the routine duties of depositing money and paying the bills. Thank God for Lynne Prescott, CCLS, LSI Executive Secretary and immediate past LSI Treasurer. She was absolutely amazing to me! She was somebody to lean on for support and guidance. If I couldn't figure something out, I would reach out to Lynne for help. No matter the time of day

or the scope of the question(s), Lynne always responded to me with a detailed response. She would even call me and walk me through some of the processes. Now that I'm comfortable with the duties, things are far less overwhelming and actually quite enjoyable. I look forward to climbing the "LSI Ladder."

Now that I've shared the story of my rise in the ranks of SCCoLPA and LSI, I'm sure many of you have similar stories about your time with your local association, LSI, or even some sort of board or committee in your local communities. All of us lead extremely busy lives and have fears and reservations about doing things we're not comfortable with. The question we face is, will we succumb to those reservations and fears, or will we tackle them head on? If you're considering a position with your local association, an LSI chairmanship, or even running for elected office of LSI, but can't seem to get past the time commitment or any fears or reservations about the job, you're not alone. There's not one member of the LSI leadership team who doesn't get nervous or feel overwhelmed about their position from time to time. What I've learned along the way is that it's not the fears or reservations about taking on a position, not about what position I've held, what committee I was on, or what accomplishments I've made; rather, it's about the people I've met, the relationships I've formed, and the experiences I've gained. I've made lifelong friendships and relationships that I wouldn't have made if I didn't take the chances I did along the way.

"To Serve, or Not to Serve?" Throughout my journey, the answer to this question has become much clearer. If you experience a similar journey to mine, your life will be richer for the experience and so will LSI's. You will meet interesting people and make lifelong relationships which will add richness to your life that far surpasses the urge to stay inside your box. So, to answer the question, "To serve or not to serve" ...SERVE!!

LS



Annual Conference





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LEGAL SPECIALIZATION SECTIONS

2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; discounted LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities. The Legal Specialization Sections (through LSI) offer continuing legal education credit for California Certified Legal Secretaries and MCLE for paralegals and attorneys.

JOIN OR RENEW AT WWW.LSI.ORG

PAY VIA CREDIT CARD OR PAYPAL

SECTIONS

(circle which sections you are joining)

- Civil Litigation
- Criminal/Family Law
- Federal Law
- Law Office Administration
- Probate/Estate Planning
- Transactional Law

LSI Member Rates:

Individual Section: \$20

All Six Sections: \$75

Non-LSI Member Rates:

Individual Section: \$40

All Six Sections: \$150

If paying by check, make payable to "LSI" and mail to the LSS Coordinator. This information is distributed to all members of the Legal Specialization Sections.

Name: _____

Email Address: _____

LSI Member, Local Association/MAL: _____

Legal Specialty(ies): _____

Counties/Courts: _____

Newsletters are emailed to members, if you would like to opt out, please email the LSS Coordinator.

Dawn R. Forgeur, CCLS
LSS Coordinator

c/o Stoel Rives LLP
500 Capitol Mall, Ste. 1600
Sacramento, CA 95814

E-mail: dawn.forgeur@stoel.com
www.lsi.org





FELICIA NORRY joined the First Legal team in September of 2012 as a Customer Service Representative. She quickly moved up within the network demonstrating strong administrative support on all levels. Her passion for wanting to help others achieve fairness through civil litigation has earned her a good standing reputation among colleagues. She has an Associate's Degree in Administrative & Business Management. At present, she is actively pursuing a California Certified Legal Secretary certificate. She's a member of Alameda County Legal Secretaries Association and enjoys volunteering at campaigns that focus on economic improvement.

The Journey, the Process, and the Transformation to Becoming a California Certified Legal Secretary

BY FELICIA COPELAND NORRY

– SUBMITTED BY ALAMEDA COUNTY LSA

Everyone remembers the question “Who do you want to be when you grow up?” In grade school, it seemed like all the girls had the same answer. They either wanted to be a nurse or a teacher. It was quite a bore. I had to respond differently. I would like to be a lawyer, I answered softly. I don't think Ms. Norman believed me, but I felt that the universe did. Although I was soft spoken, I found ways to express myself through creative projects like art, writing, and dance. From an early age, I was highly interested in mystery novels and law television shows. Wherever these people were going became a Nancy Drew mystery to me. I was determined to solve the case.

I loved to hide behind a good book but there was something peculiar about how professionals pranced around in fancy business attire and holding a briefcase that made the lifestyle appealing to me. The sound of shoe heels tap dancing across the marble lobby floor of a high building made the person appear as important. Suddenly life happened and everything changed. After becoming a single mother, I forgot about my dreams and focused on surviving homelessness.

THE JOURNEY:

In 2004 I enrolled myself into a vocational college to study Business Administration. It was recommended by the Admissions Counselor. In 2006 I completed the course and obtained a 2-year degree in Associates of Applied Science. I felt confident and eager to get started on the journey to a successful career. I had no idea the market was about to crash. The class of 2006 should have been called “The Class of Recession Employees.” I can laugh about it now,



but in the midst of the storm I was completely lost. From 2007 – 2011, I endured having respectable, but short-term job positions. I gained the experience but not the desired result. Although the degree gave me a start; I couldn't help but notice that I hadn't accomplished the anticipated success I set out for. I started to regret not taking the Criminal Justice or Forensics courses they offered while I was enrolled in college.

In a deep contemplation, I decided that it was time for me to focus on my life's purpose. One night the idea came to me in a dream to go back to school and study law office procedures. Time was not on my side to go back to school for full time paralegal training. On a self-motivated pursuit, I purchased a book called Paralegal and Practice Procedure by Deborah E. Larbalestrier, from a book store in Berkeley, California. I liked what I was reading. I planned to use that book to breathe new life into my career. Through time and practice, the skills I acquired became very valuable to employers. I took my chances on seeing if I could get

a job as a Legal Secretary. I figured the skills acquired in my vocational training would take me somewhere. I was prepared to work my way from the bottom up.

In 2012 I began working for First Legal Network. The company is rich in culture and had a good training system for new employees. Through the network, I realized that the legal field is wonderfully diverse, exciting, and intellectually stimulating. I became inspired by the operating officers and observed how they orchestrated their day-to-day affairs. I became an “On Call” In-House Coordinator for local law firms such as Reed Smith LLP, Hanson Bridgett LLP, Bryan Cave LLP, and Lewis Brisbois Bisgaard & Smith in San Francisco. Reed Smith LLP is my favorite site. I understood the relationship between the Litigation Secretary and Attorney and how to play my part. From that moment on, I knew I was supposed to be a Legal Secretary and work at a law firm.

THE PROCESS:

Fast forward to the year 2016. The plan to get more involved in the legal field started to come together. How was I going to pursue school with a full time job, husband, and teenaged son? All the signs were pointing to online school sessions. I did not have time to sit in a classroom all day. My research on certificate programs had finally paid off. Online schooling was a relief for my family and seemed to fit into our routine. I was so excited to find that Alameda County Legal Secretaries Association would take me in (through Legal Secretaries Incorporated). Finally! I am a part of a membership that exudes professional integrity and a sophisticated belief system. I delight in utilizing their continuing educational benefit.

To become a California Certified Legal Secretary is the ultimate goal. At the present moment, I am training to become a California Certified Legal Secretary. A lot of personal effort went into preparing for the examination. Upon completing a 10-week CCLS On-Line Study Group webinar, I purchased required course material: The Gregg Reference Manual, Pocket Guide to Ethics, LSI’s Law Office Procedure Manual, LSI’s Legal Professional’s Handbook, California Style Manual and other related online publications. I worked really hard to finance myself without cutting into our monthly expenses.

I make it a point to attend as many membership meetings as often as I can. I feel supported when the meeting supports a study topic. I also completed an online class titled “Beginning Legal Secretarial Training” to support my daily duties at work. I am currently enrolled in an interactive class titled “California State Court Discovery.” I’m looking forward to the next class offered. I hear there is a class on Calendaring being offered through LSI. I plan to participate in the class in aim of expansion and growth.

It sounds cliché to say this but I get a profound feeling of satisfaction in helping people fight injustice or overcome an imbalance in life. Perhaps it serves as motivation to help me overcome my own personal obstacles in life. Maybe I will inspire someone else. My son witnessed the energy I projected while attending the weekly webinar. He listened to my voice as I read the above-mentioned books out loud (simultaneously tape recording), and transcribed my recordings into 5 separate composition notebooks. Each notebook focused on the 5 areas of law as mentioned in California Legal Procedure. Among other things, I created several flashcards on Quizlet to help with memorizing legal terminology.

Profit, or Non-Profit, I hope this journey will steer me toward Environmental Law or Immigration. The California drought and President Donald J. Trump’s Executive Order on immigration are significant changes that shape the future of our world. I keep up with today’s environmental challenges and how the law makes people accountable for their actions by following Earth Justice, an organization that uses its expertise on Policy & Legislation to protect the earth. I visit their website www.Earthjustice.org to keep up with the trending news. I would like to learn more about the organization through hands-on experience. I can only speak for myself when I say that I am passionate about healing humanity. I am forever grateful to my Alameda County Legal Secretaries Association Family for being accepting of me. I pledge to demonstrate our Code of Ethics at all times. I will remain optimistic for whatever comes my way.

I would like to consider this a final career move. When the opportunity does arrive, I want to be ready for the responsibilities that come with the job. Will the seeds I’ve planted harvest?

THE TRANSFORMATION:

In honor of Golda J. Cooper, the picture in this article is a collage of some of the tools and ideas I thought of to help guide me into passing the CCLS exam. I spent a lot of time trying to come up with new ways to remember all the facts relevant to the exam.

My study sets are personal. The CCLS Online Study Group set are manila folders organized by week containing: lecture slides, homework, flowcharts, glossary, and excerpts from the Skills section of the CCLS Study Guide. The composition notebooks contain an extensive summary on discussions from the study group and notes from the Beginning Legal Secretarial Training class. It made sense to me in cross referencing the information together since both classes had similar data. The vocabulary sets (not pictured) are online via Quizlet.com. The site had some useful features that are good for quizzing yourself. All of my study supplies were purchased at The Dollar Tree.

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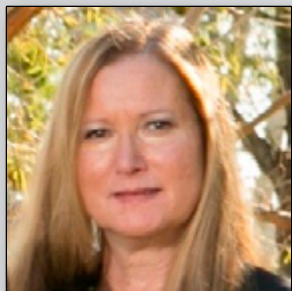
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KATHLEEN GORHAM, from the San Fernando Valley in Southern California, has lived in Palm Springs since 1990 and has served in the legal profession for 30 years. Kathleen is a past member of the San Fernando Valley Legal Secretaries Association and current member of the Desert Palm Legal Professionals Association. Kathleen works for the law firm of Slovak Baron Empey Murphy & Pinkney LLP in Palm Springs as a legal secretary and paralegal in the Probate Department. She has been with her husband Tom going on 28 years and has two lovely Australian Shepherds (Red & Cindy)!

How To Be A Super Secretary

BY KATHLEEN GORHAM
– SUBMITTED BY DESERT PALM LPA

With Excerpts/Credits where applicable

A founding member of Desert Palm Legal Professionals Association (DPLPA), chartered in 1961, Florence Ross, had kept a lot of momentos over her 50 year plus career. We recently went through a box she had and found a Sperry Rand Corp. pamphlet, printed in 1962, entitled “Memo: How to Be a Super Secretary.”

Intrigued, I read it from cover to cover. This pamphlet was originally printed in 1945, with a picture of Betty Grable at a typewriter on the front. I imagine it might have been a way to get women back from the assembly lines and into the office at the end of WWII, but may very well be considered quite sexist today. However, I thought it fun and nostalgic with still useful information.

For example, appearance. It says, “Almost every executive admires neat grooming and conservative clothing. But very few appreciate glamor – in an office. So you, clever girl, save your more colorful and festive trappings for after office hours....” Of course, this can depend on the office you’re in. I once worked in a very young law firm in Encino. It was very hip and I don’t think there was anyone there over 40. There, the heels were high and the skirts were short (and I mean short). It was also 1987. But things like wrinkled clothing and unwashed hair might indicate you don’t care, while too much makeup and perfume might signal a cover up.

My favorite is “You’re pleasant even when the going gets rough, your mood is always sunny, never sulky.” Those of us that have been in our careers a number of years have learned this, some of you really smart ones probably figured it out in high school. I sometimes seem ultra-sensitive because I genuinely care about other people. Everything I feel shows on my outside and I’ve always



been that way. So it’s a lot more work for me to hide, say anger for a co-worker that is a total jerk or an attorney that is unpleasant. It is important not to react poorly in any situation in the office. The key I found is not taking it personally. Because it isn’t personal. It is their behavior and it’s best to leave it with them and not internalize it ourselves. Others poor behavior may be unpleasant for a moment, but at least we have plenty of other things to focus on at our own desk.

Some other good ones are, “Be indispensable...but don’t indicate in any way that you know you are.” And, “Keep your desk shipshape.” “Your letters are beautiful!” “Your typewriter deserves loving care.” “You know all the essentials of filing.” “You’re well acquainted with your dictionary.”

When DPLPA held the dedication of the Florence Ross Scholarship last year at her law firms’ office, the staff and attorneys that had worked with Florence for 30, 40, even 50 years paid such wonderful praises to her not only as a

great legal secretary but as a dear person. There couldn't have been one person present that wasn't affected by the admiration these people shared about Florence. Well, there wasn't a dry eye in the room! So when I found this pamphlet that she had, I could see that she was in fact a very good example of the suggestions it gave. My mother, Peggy Mahoney, who is retired now, was also a legal secretary and a great example, confidante and mentor for me. Her mother was also a professional secretary whom I admired and I feel blessed to know these three amazing women. I encourage everyone to get to know the people you meet, because eventually you will find a priceless jewel of a person that you can confide in outside your office about problems you hopefully want to resolve quickly as well as others you can look up to and learn from their invaluable experiences.

It has been my experience that LSI is an avenue for just that. That LSI provides educational, professional and personal development information to legal support staff throughout the state is really special and unique because it

includes "personal development" and, this is so important. I find that when I feel good about myself, I have all kinds of energy to do the classes and conferences that further develop my skills, and, the bonus of getting to know and work with some really awesome people. It isn't marketing when Associations and LSI asks for more involvement from members, its because those involved don't want anyone else to miss the wonderful and amazing experiences they've enjoyed.

Many, many thanks to all of the Association Members and LSI Officers and Chairs that have reached out to us, taken their time to get to know this little desert association and helped us grow not only professionally but personally. Your kindnesses are very much appreciated.

See the 1945 version online at http://digital.hagley.org/20110622_Super_Secretary#page/1/mode/lup

Or email me for a copy of the 1962 version (gorham@sbemp.com)

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Helpful Websites

Supreme Court of the United States

<http://www.supremecourt.gov>

Office of the Attorney General

www.ag.ca.gov

California Courts

<http://www.courts.ca.gov>

California Association of Legal Support Professionals

www.calspro.org

California Codes

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

California State Bar

<http://www.calbar.ca.gov>

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<http://www.uscis.gov>

Public Access to Court Electronic Records

<http://pacer.gov>



American Medical Association

<http://www.ama-assn.org>

American Association of Law Libraries

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DONNA HOWARD has worked in the legal field as a legal secretary and then paralegal for more than twenty-five years. She has a bachelor's degree in Criminology and Restorative Justice and a master's degree in Peacemaking and Conflict Studies. She currently works at Coleman & Horowitz, LLP as a mediator and paralegal.

What is Your Style?

BY DONNA HOWARD – SUBMITTED BY FRESNO COUNTY LPA

When we think of style, we normally think of clothes, hairstyle, hats and shoes. In the legal field, we may also think of writing styles. Conflict style is not usually at the top of the list. However we each have a conflict style, or more accurately a combination of styles, which dictate how we view and respond to conflict. Understanding our conflict style allows us to become aware of our own patterns. We can then pay attention to whether these patterns are working for us and choose to explore alternative behaviors.

I have worked in the legal field since the mid 1980's. It is no secret that the legal field is fraught with conflict because without conflict, there would be no need for the profession. We work with and for people who are experiencing a great crisis in their lives – litigation, divorce, death, and tax issues to name a few. Often the anxiety of our clients leads to our own anxiety due to challenging deadlines and personalities.

My experience in the legal field resulted in a curiosity about how processes, other than litigation, can be used to resolve conflict. I returned to college and obtained my bachelor's degree in Criminology and Restorative Justice and my master's degree in Peacemaking and Conflict Studies. I am now seeking to share my education and experience with others in the legal profession to increase the likelihood of deliberate and constructive decisions when dealing with conflict. The goal of this article is to provide the reader with a cursory understanding of the five conflict styles. The reader can then test the effectiveness of the various styles for their own situations.

The five styles are collaborating, compromising, accommodating, avoiding, and forcing. All five styles are necessary for maneuvering life. There is not a wrong or right style. For example on the surface one might think "forcing" should never be used. However, forcing is a necessary style when a two-year-old is reaching for a hot



stove or attempting to run into traffic. I have listed the five styles below with a brief explanation of the perspective one holds when using the style and under which situations the style is most effective.

COLLABORATING

When we have a collaborating perspective, we view conflict as neutral. We affirm the differences of each other and respect each other's uniqueness. We recognize there are tensions in the relationship and contrasts in viewpoints. We see conflict as an opportunity for growth. There is an underlying belief that win-win outcomes are only limited by our imagination. This conflict style requires time and effort as the parties reach towards consensus. This style is best used when a conflict requires a more permanent solution. Research has shown that parties are more likely to hold true to their commitments when a conflict is resolved through collaboration.

COMPROMISING

A compromising lens views conflict as mutual difference which is resolved through the democratic process. There is an underlying belief that in order to resolve conflict one must "lose" something. This style requires a moderate level of assertiveness and cooperation. This style is more appropriate for situations where one needs a temporary

solution or where both sides have equally important goals. The pitfall of compromising is that it is often chosen because it takes less effort than collaborating, not because it is the better strategy.

ACCOMMODATING

An accommodating style indicates an underlying belief that conflict is usually disastrous so one must abdicate. Relationships are prized at any costs. Normally the accommodator relinquishes their own interests, ignores the issues, and attempts to keep the peace at any price. This style frequently works against one's own goals, objectives and desired outcomes. It is often motivated by fear of the unknown. This style can be used effectively as a short term strategy. For instance if someone has decided they are going to seek other employment, they may opt to accommodate the current employer because they know it is a temporary measure. This style is also effective when the other party is an expert or has a better solution. It is also effective for preserving future relations with the other party. This style should be used infrequently and with intention.

AVOIDING

This style has an underlying belief that conflict is hopeless and should be avoided at all cost. This style is often referred to as the flight or fight style. There is a strong belief that conflict cannot resolve in a positive outcome. Therefore one must concede to the other party or leave the relationship. The overuse of avoidance often leads to a cycle of unresolved conflict which can lead to violence. Often this style is identified with delayed responses and withdrawing – emotionally or through physical distancing. Avoidance is a useful strategy when the issues are trivial or when you are not concerned about the outcome. It can also be an effective tool during an emotionally charged atmosphere and where space needs to be created. Although issues sometime resolve themselves, “hope is not a strategy.” Avoidance is not considered a viable long term strategy to conflict. This style should also be used with great intention.

FORCING

The underlying belief in this style is that there is only one “right” answer and that only one party can be “right.” Pressure and coercion are seen as necessary in the resolution of conflict. There is a need to manipulate and control the outcome. This is also known as the “win-lose” approach. A party acts in a very assertive way to achieve their goals without seeking to cooperate with the other party. In fact, there is little consideration to the expense of the other party. As discussed above, this approach may be appropriate during emergencies and when time is of the essence. When the parties are aware of the need for quick, decisive action, this approach is supported.

When I was first introduced to conflict style, I was certain I was a collaborating individual. What I discovered after taking a conflict assessment was that my first inclination was to collaborate but I quickly moved to forcing and then avoidance. It was difficult to accept that although I believed in collaboration, I did not possess the skill. I learned our conflict styles are more often than not taught to us by observing our parents and other relatives. As we grow older, life's pressures and stressors make it difficult to find the time to consider whether our conflict styles are helping us to obtain our goals in life. I also learned that conflict style is a learned skill which can be modified at any point in our lives through education, awareness and practice. Recently when I retook the same conflict assessment, and I was pleased to learn that my ability to remain collaborating has increased and my tendency to force or avoid have diminished significantly. I hope this article encourages you to think about your conflict style and how it can be modified to help you obtain your goals in life.

LS



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APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:
April K. Ignaitis, CCLS, CCLS Certifying Board, P.O. Box 2879, Cupertino, CA 95015

(Select one) ☐ **Northern California** (Select one) ☐ **Saturday, September 16, 2017**
☐ **Southern California** ☐ **Saturday, March 17, 2018**

- **Deadline:** Applications must be received 60 days prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than 60 days (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least 30 days prior to the exam date.

EXAMINATION FEES (Select Payment Type)		Check <input type="checkbox"/> Payable to "LSI" Mail to above address	PayPal <input type="checkbox"/> Email exam application to CCLSCertifyingBoard@gmail.com . Payment link will be provided upon confirmation of eligibility to sit for exam.
LSI Members <input type="checkbox"/>		Non-LSI Members <input type="checkbox"/>	
On Time Registration Fee	\$ 25.00	On Time Registration Fee	\$ 75.00
Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	30.00	Late Fee (if applicable)	30.00
TOTAL DUE w/o Late Fee:	\$125.00	TOTAL DUE w/o Late Fee:	\$175.00

Personal Information

Name: _____

Mailing Address: _____

Last 4 digits of SSN: _____ Email: _____

Phone (Day): _____ Phone (Evening): _____

LSI Member: ☐ Yes (enclose copy of LSI Membership Card) ☐ No

Name of Local LSI Association: _____

Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

Summary of Duties: _____

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

Date: _____

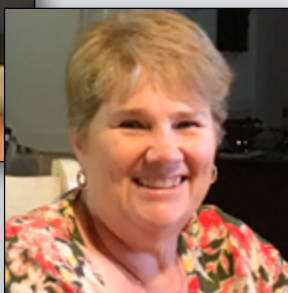
Applicant Signature _____

*Fees subject to change without notice.

Rev. February 2017



JAN KUYKENDALL worked in the legal field for over 34 years. In 2014, her employer retired and she now works for the State of California Department of Corrections and Rehabilitation in Stockton.



COLLEEN YOUNG worked for a criminal defense attorney and is currently volunteering at the local library teaching people how to use computers and classes on Microsoft programs.

Mission: Possible Get Smart With Education

BY JAN KUYKENDALL AND COLLEEN YOUNG – SUBMITTED BY STOCKTON-SAN JOAQUIN COUNTY LSA

The members of Stockton-San Joaquin County Legal Secretaries Association are ready to welcome LSI and its members back to the beautifully remodeled Stockton Hilton for the August 2017 LSI First Quarterly Conference on August 18-20, 2017.

We are working hard to fine-tune our preparations so that your stay will be educational but fun! Brush up on your “spy” knowledge so that you can compete in our trivia session at the Friday Night Reception, where we will “Get Smart.” The reception will be poolside, as usual, and the Hilton will be serving up a delicious spread of appetizers for you.

After the reception, and on Saturday during the lunch break, if you are not planning to attend one of our “LSI’s Angels” luncheons, there are plenty of great restaurants within walking distance, or a short drive away, including Red Lobster, Olive Garden, Applebee’s, and El Torito, as well as fast food restaurants, and a variety of local places offering all types of international cuisine. For all you Starbucks fans, there is a kiosk in the hotel lobby.

After business concludes on Saturday afternoon, you can take advantage of shopping opportunities at nearby malls or take a tour of a number of award-winning wineries in the Lodi area or you can just relax by the pool or in the lounge until it’s time for the banquet.

LSI will again be offering a diverse range of LSS seminars and workshops for you to “Get Smart” on Friday night after the reception, and on Saturday throughout the day.



At the banquet on Saturday night, get ready to be “shaken, not stirred” as our James Bond themed soiree gets underway. The menu will once again feature the Hilton’s delicious food, so relax and enjoy the evening.

On Sunday morning, you will wind up your weekend with a brunch featuring a yummy breakfast buffet which is sure to please any palate, and then we will send you home with a fond farewell and a “Mission: Accomplished,” but already looking forward to welcoming you back for the August 2018 Quarterly Conference, where we will be bringing you to the “Wild, Wild West.”

So, start packing your trench coats and fedoras, and come prepared! We will be waiting for you!

LS



PAULINA RAMIREZ-MARTIGNON, Paralegal-President of MT Evictions Team, the Landlords Ally with over twelve years of experience with Landlord and Tenant issues and with a network of several attorneys that have greater amount of experience with the Eviction Law to ensure that clients have the best eviction process possible. MT Evictions Team is passionate about their work and want to help clients to the best of their knowledge.

Stay Informed! Proper Rent Increases

BY PAULINA RAMIREZ-MARTIGNON
- SUBMITTED BY RIO HONDO DISTRICT LPA

The start of a new year may signify a rental increase. Although a rent increase may not always be the case, it is important for the landlord and tenant to be well-informed. An invalid rent increase is not enforceable and may result in one losing his or her case in the event an eviction is needed.



To determine the increase a landlord can charge in rent, the landlord must correctly determine whether the property is subject to a rent control ordinance – as various properties in Los Angeles City are affected by such controls.

If your property is not under a rent control ordinance, under CCP 827 you have two options:

- An increase of more than 10 percent requires a 60-day Notice of Change in Terms.
- And an increase less than 10 percent may call for a 30-day Notice of Change in Terms.

If property is in Los Angeles City and it is subject to rent control:

- An increase of 3 percent can be done for the fiscal year and requires a 30-day Notice of Change in Terms.
- An additional 1 percent increase can be done if the landlord pays for gas or water/power and it requires a 30-day Notice of Change in Terms.
- An additional increase of 10 percent can be done for each additional occupant moved in within 60 days and that is not included in the original written lease.

PROPER SERVICE OF RENT INCREASE:

Generally, a notice is to be delivered personally. A notice can be mailed if it cannot be personally delivered, however, an additional 5 days must be added to the notice under Code of CCP 1013.

Please note the law constantly changes. As a landlord or tenant, one must be aware of these changes. MT Evictions stays updated with the law and is available to answer your questions in the gamut of Landlord-Tenant Law. If there are any doubts, you can count on the MT Evictions team to assist you.

LS

ANSWERS FROM QUIZ ON PAGE 31

CCLS QUIZ: ANSWER KEY

- | | | | |
|----|---|-----|---|
| 1. | B | 6. | B |
| 2. | A | 7. | D |
| 3. | A | 8. | A |
| 4. | C | 9. | B |
| 5. | A | 10. | B |



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 5 and ending November 1, 2017. 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
Preparing a Proper Caption
Preparation of Documents Filed with the Court
Basics of Civil Litigation

CLASS SESSION OPENS ON TUESDAY, SEPTEMBER 5, 2017

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: _____

\$150 LSI Member _____ Association: _____ LSA/LPA

\$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.)

Name on Card: _____

Visa/MC Credit Card # _____

Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN August 31, 2017, to LSI Legal Professional Training/ Seminar Chair, training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. 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 5, 2017. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals



LSI
*Educating California's
Legal Support Professionals*

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 November 6 and ending December 18, 2017. 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, NOVEMBER 6, 2017

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

Name: _____ Email: _____
Address: _____
City/Zip: _____ Telephone: _____

\$30 LSI Member _____ Association: _____ **LSA/LPA**
(No abbreviations please; status is verified)

\$50 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)
Name on Card: _____
Visa/MC Credit Card # _____
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN November 3, 2017, to training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after November 6, 2017. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals

CCLS QUIZ:

LEGAL TERMINOLOGY - CITATIONS

DIRECTIONS: FOR EACH SET OF CITATIONS BELOW, DETERMINE WHICH IS CORRECT.
(ALL CITATIONS ARE PURSUANT TO CALIFORNIA STYLE MANUAL.)

- | | |
|--|--|
| 1A. CODE OF CIVIL PROCEDURE, SECTION 2025 | 6A. <i>WATERS V. ROGERS</i> (1998) 151 F.3D 1247 |
| 1B. (CODE CIV. PROC., § 2025) | 6B. <i>WATERS V. ROGERS</i> (9TH CIR. 1998) 151 F.3D 1247 |
| 2A. (80 OPS.CAL.ATTY.GEN. 203 (1997)) | |
| 2B. 1 WITKIN, SUMMARY OF CAL. LAW (9TH ED. 1987), CONTRACTS, § 791 | 7A. CIVIL CODE SECTION 1782, SUBD. (A)(1) |
| | 7B. CIVIL CODE SEC. 1782, SUBD. (A)(1) |
| 3A. <i>ABC COMPANY V. XYZ, INC.</i> (2011) 87 CAL.APP.4TH 1490, 1493 | 7C. (CIVIL CODE § 1782, SUBD. (A)(1)) |
| 3B. <i>ABC COMPANY V. XYZ, INC.</i> (2011) 87 CAL. APP. 4TH 1490, 1493 | 7D. (CIVIL CODE, § 1782, SUBD. (A)(1)) |
| 3C. <i>ABC COMPANY V. XYZ, INC.</i> (2011), 87 CAL.APP.4TH 1490, 1493 | 8A. <i>HAYES V. LARRABY</i> (MAY 3, 1999, S068112) ____ CAL.4TH ____ |
| 3D. <i>ABC COMPANY V. XYZ, INC.</i> , (2011) 87 CAL.APP.4TH 1490, 1493 | 8B. <i>HAYES V. LARRABY</i> (MAY 3, 1999, S068112) |
| | |
| 4A. (CONST., ART. VI, § 10.) | 9A. CALIFORNIA RULES OF COURT, RULE 224 |
| 4B. (CAL. CONST., ART. VI, § 10.) | 9B. (SUPER. CT. L.A. COUNTY, LOCAL RULES, RULE 13.1) |
| 4C. (CAL. CONST., ART. VI, § 10.) | |
| 4D. (CONST., ART. VI, § 10.) | |
| | 10A. SUPRA. |
| 5A. <i>ID.</i> | 10B. <i>STANDISH V. RIGHTCO</i> (N.D. 1998) 573 N.W.2D 823 |
| 5B. WAT. CODE, § 32, <i>ET SEQ.</i> | |

CCLS QUIZ ANSWERS ON PAGE 28



ANNE K. WOLF has over 20 years' experience as a paralegal in California. In one of her current roles as an adjunct faculty member in the College of Law at John F. Kennedy University in Pleasant Hill, California she serves as the Paralegal Internship supervisor and the Legal Employment Workshop director. These courses offer her a chance to share her wealth of knowledge and experiences with new members of the profession. She is currently employed full time as the Education and Programs Coordinator at the Contra Costa County Bar Association.

MUSINGS OF A PARALEGAL: WHAT LEGAL SECRETARIES MEAN TO ME

BY ANNE K. WOLF – SUBMITTED BY CONTRA COSTA COUNTY LPA

As I was trying to come-up with a witty title for my musings on the virtues of the Legal Secretary and their role in the law firm milieu, I began with some movie titles. *Babysitter's Club*, *Beauties and the Beasts*, and *the Paper Chase* came to mind. Deciding not to diminish anyone in this article, I decided to move forward extolling only of the attributes of the virtuous. And the Legal Secretary is nothing if not virtuous.

There truly has to be a special place in heaven for Legal Secretaries. Imagine it - a high-end spa, a lavish slightly heated chaise, fluffy pillows, a trickling waterfall, calming music emanating from the delicate surround sound, bottomless goblets of sparkling water and chardonnay (or your preferred red), small bites of the best dark chocolate ever, the scent of (insert your favorite here) in the air, a favorite book on your iPad, and someone offering a never-ending shoulder massage, all while wrapped in an amazingly soft, perfectly fitted long robe. There is no reward too good for the saintly Legal Secretary.

I was a paralegal for over 20 years and worked in several law firms, ranging in size from 300+ attorneys to a sole practitioner. The Legal Secretaries I worked with were as varied in style, personality and background as you might imagine, but they were all smart, dedicated, hard-working individuals.

In law firms, large and small, I always found the Legal Secretaries to be my first, best resource. They functioned as my navigator, mentor, local rule advisor, confessor, attorney profiler and source of all the tricks-of-the-trade. I learned the Legal Secretary was the first point of client contact and deftly finessed the relationship from engagement letter through each and every billing cycle. Handling every incoming and outgoing document – who better to give me the scoop about what was going on in my case than the secretary seeing all the mail, clicking on all the emails and transcribing all the voicemails. I could always count on them



for help with the infamous last-minute court filing crises – making the last-minute edits, typing the proofs of service or calling the bike messengers.

Today, in my Legal Employment Workshops for the Legal Studies/Paralegal Certificate students at John F. Kennedy University, I constantly remind them of three essential characteristics needed to be successful in a law firm and working with attorneys:

- Be a team player. The best work gets done when everyone works as a team and feels the importance of their role.
- There is no job too small or unimportant no matter how many years of experience you have. If something needs to get done– take care of it.
- Integrity in all things. Always, and without exception, do your very best and work until the job gets done!

Needless to say, I learned these valuable work and life lessons from the example and under the tutelage of the many incredible Legal Secretaries I worked with over the years. I still fondly remember several of them.

- Rhoda, the grandmother, who, aside from all her other duties, made sure all the young paralegals on our very large trial team ate well and got enough rest. She warned us of the partners' daily moods and made sure

my team and I always had the opportunity to get the partners extra Oakland A's or Golden State Warriors' tickets when they were up for grabs. She taught me not to take it all so seriously.

- Marie was the ultimate gatekeeper and influencer. I was never quite sure who was in charge on her desk. She at least let the attorneys think they were. Her desk was impeccable, allowing her to find any document or file almost immediately. She taught me being organized is extremely crucial to the job, and by example, showed me how to gently mollify even the fussiest and grumpiest of lawyers.
- Lisa worked diligently and gave her all to the firm, her attorneys and their clients while handling personal challenges that included a husband on active duty overseas and three children. She showed me the possibility and power of work/life balance.
- Karen made me smile every day and handled every

stressful or uncomfortable situation with poise and aplomb. She taught me when to smile and walk away.

- Maureen taught me what not to do. After a rocky start - cocky young senior paralegal meets highly respected beloved secretary and oversteps her boundaries - things didn't go well. It took about two years for me to be fully redeemed. We did, however, eventually become late night trial buddies and discovered we had a lot in common. She taught me a lesson, and forgiveness.

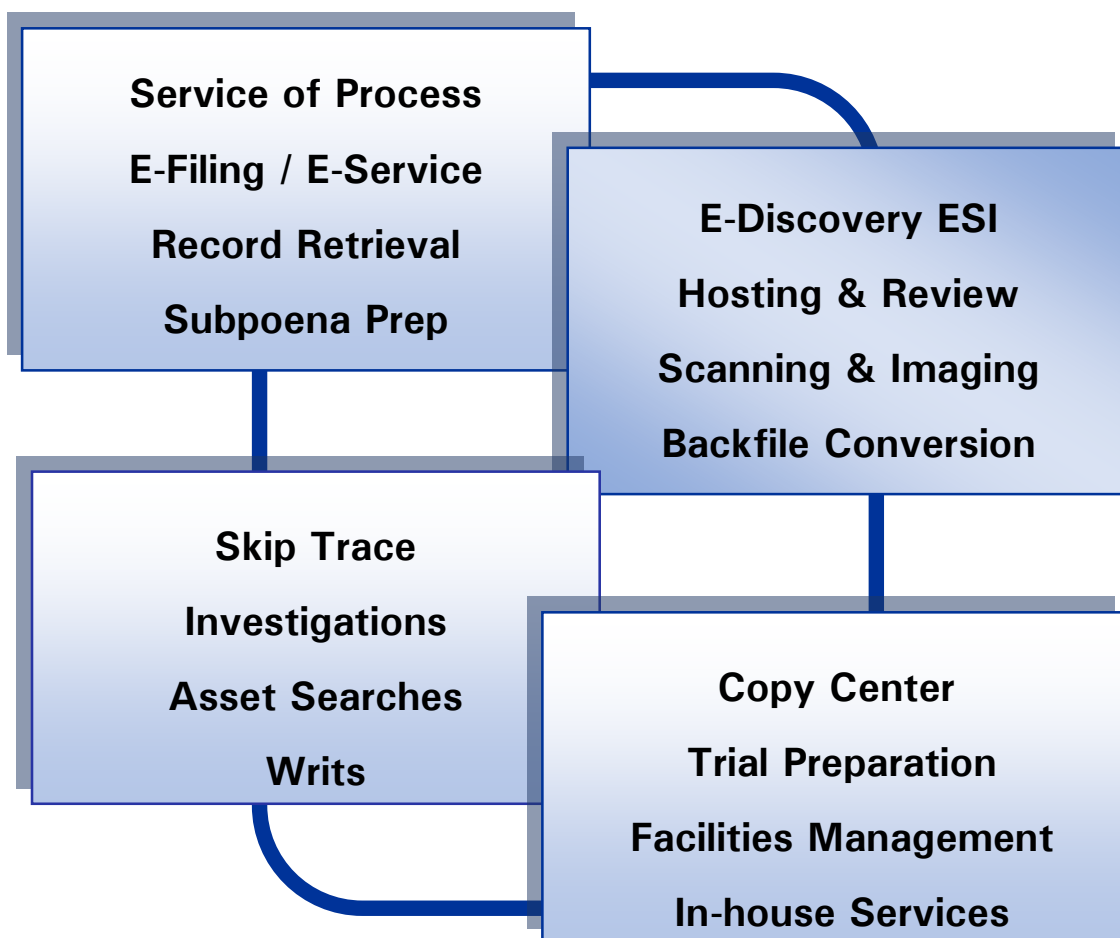
So as I picture them at the high-end spa reaping the rewards of their many years of hard work, I also see myself fluffing their pillows and refreshing their chocolate, in gratitude for my successes and the lessons learned. Thank you all. LS

Dates to Remember in 2017

- | | |
|-----------------------------|---|
| August 14, 2017 | Registration deadline for CCLS Workshop at First Quarterly Conference |
| August 14, 2017 | Registration deadline for Legal Specialization Sections Seminars at First Quarterly Conference |
| August 16, 2017 | Last day to submit CCLS Exam Application with late fee to the CCLS Certifying Board for September 16, 2017 exam |
| August 18-20, 2017 | LSI First Quarterly Conference
Stockton Hilton, Stockton, CA
Hosted by Stockton-San Joaquin County LSA |
| August 31, 2017 | Registration deadline for Beginning Legal Secretarial Training Class (online class) |
| September 1, 2017 | Last day to submit articles for November issue of The Legal Secretary |
| September 16, 2017 | September 16, 2017 CCLS Exam |
| October 9, 2017 | Registration deadline for LSI Second Quarterly Conference |
| November 10-12, 2017 | LSI Second Quarterly Conference
Lions Gate Hotel & McClellan Conference Center, McClellan, CA
Hosted by Placer County LPA |
| November 13, 2017 | Registration deadline for Overview of California State Court Discovery (online class) |



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LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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.

<p>*NEW BENEFIT: LEGALSHIELD/IDSHIELD Contact: Courtney Coats, Independent Associate (925) 580-6446; coats8@legalshieldassociate.com LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</p>	<p>QUESTIONS AND CONCERNS CONTACT: Heather Edwards, LSI Vice President LSI Marketing Committee Coordinator (818) 482-7040 heatheredwardslsi@aol.com</p>
<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, info@lsi.org, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
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<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance & Life Insurance, Annuities, Retirement, Investment & Estate Planning, Mutual Funds, & 401K</p>
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<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

INDISPENSABLE



LEGAL PROFESSIONAL'S HANDBOOK

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Busy lawyers rely on their staff to handle many details of their practice. They look to you, as a professional, to know what to do, and when and how to do it. The **Legal Professional's Handbook** provides you with the answers ...just as it has for over 75 years! Each chapter contains detailed practice forms and step-by-step instructions covering every major area of California law practice. The Handbook is an invaluable resource to add to your entire reference library!

LSI MEMBERS-ONLY PRICE\$331.80
Nonmembers Price.....\$474

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This title is updated annually for subscribers
by replacement pages.*

LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

This Manual contains detailed practice forms for every major area of law practice, along with step-by-step instructions for completing them. This is a "must-have" forms guide for legal secretaries, paralegals and new lawyers; and it's a great resource for training your office staff. In fact, the Manual is frequently used in schools, workshops and legal secretaries classes. You'll also find handy miscellaneous aids, such as procedural checklists and guidelines, tips on transcription and proofreading, law office abbreviations and legal terminology, and a list of useful reference books.

LSI Members-Only Price.....\$182.70
Nonmembers Price.....\$261

*Price includes shipping. Add applicable sales tax.
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If you are interested, please contact:

Editor, *The Legal Secretary*

Barbara Barregar at LSI.TLSeditor@gmail.com

Quarterly Assignments

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

- **AUGUST ISSUE (to be submitted no later than **June 1st**):**
Alameda County, Beverly Hills/Century City, Conejo Valley, Contra Costa County, Desert Palm, El Dorado County, Fresno County, Humboldt County, Imperial County
- **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, Placer County
- **FEBRUARY ISSUE (to be submitted no later than **December 1st**):**
Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County, Santa Barbara
- **MAY ISSUE (to be submitted no later than **March 1st**):**
Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County, Ventura County

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	QUANTITY	UNIT PRICE	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms.(no charge for pdf download @ www.lsi.org)		5.00	
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam.		N/C	
CCLS STUDY GUIDE Sample questions and answers to assist in preparing for all sections of the CCLS Exam.		25.00	
CCLS STUDY KIT SECTIONS All sections include suggested 10 and 18 week syllabi.			
CALIFORNIA LEGAL PROCEDURE (CLP) CLP section of the CCLS study Guide, CLP Worksheets, CLP Study Tips, list of additional references required for CLP		30.00	
LEGAL TERMINOLOGY (LT) California Style Manual (book included with section), LT section of CCLS Study Guide, LT worksheets, LT study tips, list of additional references required for LT		50.00	
LEGAL COMPUTATIONS (LC) LC section of CCLS Study Guide, LC Worksheets, LC Study Tips, List of additional references required for LC		30.00	
SKILLS (SK) SK Section of CCLS Study Guide, SK Worksheets, SK study tips, list of additional references required for SK		30.00	
ABILITY TO COMMUNICATE EFFECTIVELY (ACE) Gregg Reference Manual, 11 th ed. (book included with section), ACE section of CCLS Study Guide, ACE worksheets, ACE study tips, list of additional references required for ACE		199.00	
LAW OFFICE ADMINISTRATION (LOA)** <i>Pocket Guide to Legal Ethics</i> (book included with section), Secretary of State Notary Public Handbook, LOA section of CCLS Study Guide, LOA worksheets, LOA study tips, list of additional references required for LOA		70.00	
REASONING & ETHICS (R&E)** <i>Pocket Guide to Legal Ethics</i> (book included with section), California Rules of Professional Conduct, Secretary of State Notary Public Handbook, R&E section of CCLS Study Guide, R&E worksheets, R&E study tips, list of additional references required for R&E		70.00	
** If LOA and R&E are purchased as individual sections at the same time, there is a \$40.00 discount because the same reference book is included in both sections.			
COMPLETE CCLS STUDY KIT (ALL 7 SECTIONS)		199.00	
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