



THE Legal Secretary®

February 2010

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Getting the Most Out of the 2010 February Quarterly Conference

BY BEATRICE BALLANCE



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February 2010

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THE LEGAL SECRETARY MAGAZINE

is published Quarterly by Legal Secretaries, Incorporated

Edited by: DEBORAH RICKERT, CCLS

Designed by: PERRY BLEECKER, Perry Bleecker Design

Printed by: MODERN LITHO

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THE LEGAL SECRETARY, published quarterly by Legal Secretaries, Incorporated, is a benefit of membership. Subscriptions for members are included in annual dues. Subscriptions are available to non-members, at a cost of \$25 per year (4 quarterly issues), through LSI Corporate Office, P.O. Box 660, Fortuna, California 95540-0660. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered and is made available with the understanding that the publisher is not engaged in rendering legal or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought. The opinions expressed by the individual authors are their own and are not necessarily those of Legal Secretaries, Incorporated.



CHRISTA DAVIS
LSI PRESIDENT

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

Building Membership Through Education

BY CHRISTA DAVIS

What exactly goes on at a Board of Governors meeting during the quarterly and annual conferences, and why do we do what we do?" "Why do we have to spend so much time in the business meeting when we could use that time to have more educational workshops?" Those questions were asked at the November Quarterly Conference. So why do we have to have a business meeting?

The main focus of the Board of Governors meeting is to conduct the business of the corporation – Legal Secretaries, Incorporated. We are a non-profit mutual benefit corporation – a 501 (c) (6) corporation under the California Corporations Codes and thus must comply with the laws to maintain such a corporation. In order to comply with California law, we must conduct the business of the corporation and keep proper records. Education is certainly important, but we still need to take care of business. The status of the corporation's financials and any action taken must be addressed and brought before the Board of Governors to ensure the Executive Committee is overseeing the finances and programs of LSI responsibly.

The Executive Committee has been delegated specific powers to act on behalf of the Board of Governors. The responsibilities of the Executive Committee are set out in our Bylaws, more specifically, Article VIII, Sections 1 – 6, and the specific powers of the Executive Committee are set out in Article XI of the Bylaws. As a member of Legal Secretaries, Incorporated, it is important to become familiar with the Bylaws and Standing Rules of LSI so as to understand how and why the corporation operates the way it does.

Issues such as revising the conference schedule, purchasing audio/video equipment, changing the name of the corporation are things that have to be decided by the Board of

Governors. In fact all major issues and financial decisions must be decided by the Board of Governors. The Executive Committee merely follows through with the decisions made by the governors, and issues that are developed and discussed at the Board of Governors meeting. Article XI (a) allows the Executive Committee... "To authorize expenditures in the amount not to exceed \$250." Any financial decisions that exceed \$250 may not be made without the approval of the governors, so it is the governors who make things happen. They are the decision makers and this takes place on a quarterly basis at our conferences – hence the Board of Governors meeting. Only governors have the right to vote at the quarterly conferences, and delegates at the annual conference. However, any member has every right to ask questions at the business meetings, voice opinions, make a motion, second a motion, or amend a motion. So if you would like to see something happen within LSI, use your voice – raise your ideas, issues, concerns at the next Board of Governors meeting.

As set out in article XIV, Section 1, among other things, the Board of Governors has the power "to conduct, manage, and control the affairs and activities of LSI and to make such rules and regulations therefore not inconsistent with law, the Articles of Incorporation, [these] Bylaws or the Standing Rules, as it may deem best." It is the duty of the governors to report back to the local associations after each conference to bring the members current of any business conducted, decisions made during the meeting, as well as provide the highlights of the conference. For those members that have never attended a conference, this may be the only way they are kept apprised of the current business of the corporation.

Over the years, the conference schedule has changed. During the 2006 – 2008 fiscal years, the business was conducted on Saturday morning, leaving the remainder of the conference for educational and social events. In 2008, the governors voiced their concerns that they did not have enough time to meet and discuss the relevant issues before them at each meeting. It was the governors who decided to expand the meetings and resort to the prior conference schedule – the schedule we currently follow. In addition to attending the Board of Governors meeting, conference attendees now have adequate time to attend educational workshops, socialize and do some site seeing. Now, a new dilemma has arisen: Do we need more time to attend more

viate the time issue of attending more educational workshops such as the local association workshop and the CCLS workshop at conference? That is your call, but you need to let your opinion be known. Talk to your governor, contact the Legal Specialization Section Coordinator, talk to any member of the Executive Committee and raise the topic on the floor at the next conference. Voice your opinion, ideas, suggestions because if you don't, who will? Will this become another question dangling but never answered? It is your call.

Legal Secretaries, Incorporated is your corporation. Use it to the advantage of you and your fellow members. Become better acquainted with the Bylaws and Standing Rules. Take an active

The main focus of the Board of Governors meeting is to conduct the business of the corporation – Legal Secretaries, Incorporated.

educational workshops?

The current conference schedule allows for six educational workshops sponsored by the Legal Specialization Sections at each conference: two on Friday evening at 7:30, two on Saturday morning at 10:30, and two on Saturday afternoon at 4 p.m. Additionally a local association workshop and a CCLS workshop are presented on Saturday at either 10:30 a.m. or 4 p.m. Unfortunately we are unable to be in two places at one time, so conference attendees are able to attend at most three workshops at each conference. That is not bad in terms of acquiring CCLS credits over a weekend, but in addition to the Legal Specialization Section workshops, conference attendees would like to be able to attend the local association workshop and the CCLS workshop as well. So what do we do? Do we cut down the time of the business meeting? Should we resort back to holding workshops at 7:30 on Saturday mornings before the Board of Governors meeting, or maybe schedule workshops on Sunday morning? Would it help to bring back the Regional Workshops?

The Regional Workshops were originally established to provide a full day of education to legal professionals in the remote areas of the state. The Spring Regional Workshop was usually held in Southern California, and the Fall Regional Workshop in Northern California. However, it was discovered over time that holding the Regional Workshops in remote areas did not allow for adequate attendance. The Legal Specialization Section Leaders then began holding the Regional Workshops in more accessible areas, but attendance was still down. Much work and time is put into presenting the Regional Workshops and the lack of attendance forced the Legal Specialization Section Leaders to put the Regional Workshops on hiatus. So do you miss the Regional Workshops? Should we bring them back? If we brought back the Regional Workshops would this help to alle-

interest in what transpires within the organization. Push for more education and more guidance if that is what you feel we need. Is it time to rethink the name of the corporation? Are we providing adequate benefits to our members? Whatever it may be, take an active interest because that is what moves this organization forward.

At the February Quarterly Conference, LSI will be accepting bids to host the following upcoming quarterly conferences: November 2011, February 2012, August 2012, and the 2012 May Annual Conference. The bids will be voted on at the Post-Annual Board of Governors meeting at the 2010 May Annual Conference in Sacramento. Don't let another opportunity to show off your city, work with your local association members and hold a conference in your own back yard pass you by.

Candidates for LSI Office will be announced at the February Quarterly Conference, and elections will be held at the May Annual Conference, to be voted by the delegates. If you have been thinking about serving LSI on the state level, the opportunity is before you – take advantage of it! If you are interested in serving as a chairman on the 2010-2011 Board, let any member of the Executive Committee know. This is a great way to become more involved in LSI, further your education and knowledge and build character.

There are plenty of opportunities to become involved in LSI; you just need to take that first step. **LS**



SANDRA T. JIMENEZ
LSI EXECUTIVE SECRETARY

Sandra T. Jimenez, Legal Assistant since 1990 to Richard W. Bohlander, sole-practitioner, office located in El Centro, California. Happily married to my husband Mike for over 38 years. We have one son, Mike, who lives in Santa Barbara, CA. California Certified Legal Secretary, since October 17, 1992. Certified Legal Assistant since June 10, 1988. California Notary Public, commission expires June 13, 2010. Associate of Arts degree in Business from Imperial Valley College. Member, Imperial County Legal Professionals Association.

Member, California Legal Secretaries, Incorporated. Positions held: Day in Court Chair 1994-1996 and 2002-2004; Transactional Law Section Leader 1996-1999, received LSI's President's Award for Outstanding Service in 1999, CCLS Chair 2004-2006, LSI Treasurer 2006-2008, and LSI Executive Secretary 2009-2010.

Pleasure in Our Jobs

BY SANDRA T. JIMENEZ, CCLS

Pleasure in the Job Puts Perfection in the Work —ARISTOTLE

Today I found myself thinking about my career in the legal field, my current employment and my membership in LSI. I have remained in the legal field since I first set foot in an attorney's office back in 1982. More importantly, I have remained employed by the same attorney for the last 20 years. I ask myself why have I stayed? Is this where I was supposed to be? It's not because I am not able to do other things, other tasks, or learn new things. I am sure that I am not alone. Many who, like myself, entered the legal field many years ago didn't know that the legal field would be a lifetime career. Why are we still here? Why do we stay? Is it because we enjoy what we do?

In trying to answer the above questions, I believe the following reasons apply:

1. Financial reasons: money makes the world go round. We have great jobs in a well paying field.
2. We have invested personal time and money in building a career, by enrolling in legal training courses and becoming certified and complying with continuing legal education.
3. We have obtained membership in a great legal professionals' association and have met lifetime friends.
4. We have come to appreciate mentors who have come in and out of our lives - who took enough interest to lead, direct, and point us in the right direction during those crucial beginnings. Now, we are the mentors.

5. And finally, we have experienced LSI, by actively taking part and becoming involved and know that LSI is good for us and likewise, we are good for LSI.

Do we want to give all this up now? Definitely not - because: (1) we get paid adequately; (2) we are confident because we have taken the time to educate ourselves in this field and take pride in the work that we do; (3) we have become members of a great statewide organization which we have made our own; (4) membership in this association has assisted us in our careers, made us the confident legal professionals that we are today. Now it is time to give back to the organization by mentoring those who are coming up the ranks, those who will be the leaders of LSI tomorrow. Finally, (5) we *are* LSI. Not only do we take pride in our membership in this organization, we take pride in our careers as legal professionals and we will *not* give it up.

We have made the legal field and LSI our lifetime career because we *enjoy* the work that we do. We have learned to become efficient by continually educating ourselves by attending quarterly conferences, attending Legal Specialization Sections workshops, and attending Regionals. We have it all and because of LSI, we enjoy it.

I have to share a true story. I received a phone call from a woman who called me out of the blue last summer. She told me she had a bachelor's degree (can't remember in what field) and that she had lost her job. There were no job openings in her field and she was looking for a new field. She wanted information on legal secretarial or paralegal training. She had researched fields that were always hiring

and found that there were always jobs in the legal field and that it seemed interesting. She wanted to enter a field that would assure her continued employment. I didn't know this woman and she asked if I would take a few minutes to talk with her. My name was given to her by a friend of hers who also lived in San Diego.

First, I told her why I thought the legal field is an interesting field: how all the cases were different and unique, how laws were continually changing and that it was a challenging field indeed with calendaring deadlines, and never a dull moment. I told her about all the tasks that I perform in my office, which are many, including notary duties. I also mentioned to her that all the knowledge that she would obtain, could also assist her in her own personal life (bankruptcy, real estate, probate, civil, etc.) which is definitely a plus. Then I reviewed LSI resources with her and LSI website information. I also provided her the San Diego LSA website for local contact information in her area. I referred her to the local community college for legal assistant classes, and provided her with contact information for the NNA for notary public information.

Well, we must have talked for almost an hour on the phone. Toward the end, she stated to me "It seems like you really enjoy your job, to talk about it the way you have." I remained quiet for a second because I hadn't really thought about whether I enjoyed my job or not. Then I stated to her - "I guess I do!" Before ending the call, she stated to me that she was so glad that she had called and thanked me for taking the time to talk to her. I received a wonderful "thank you" card a few weeks later from her.

This incident made me think about how thankful I was for being in the legal field all these years, for the knowledge and training that I had gained, the work that I do and for my membership in LSI. I do enjoy what I do and this is where I am supposed to be.

We have all worked hard for many years to get to where we are trained, efficient legal professionals and now we find ourselves in a position to know that pleasure in our jobs does put perfection in our work. Enjoy what you do and you will do it well!

LS

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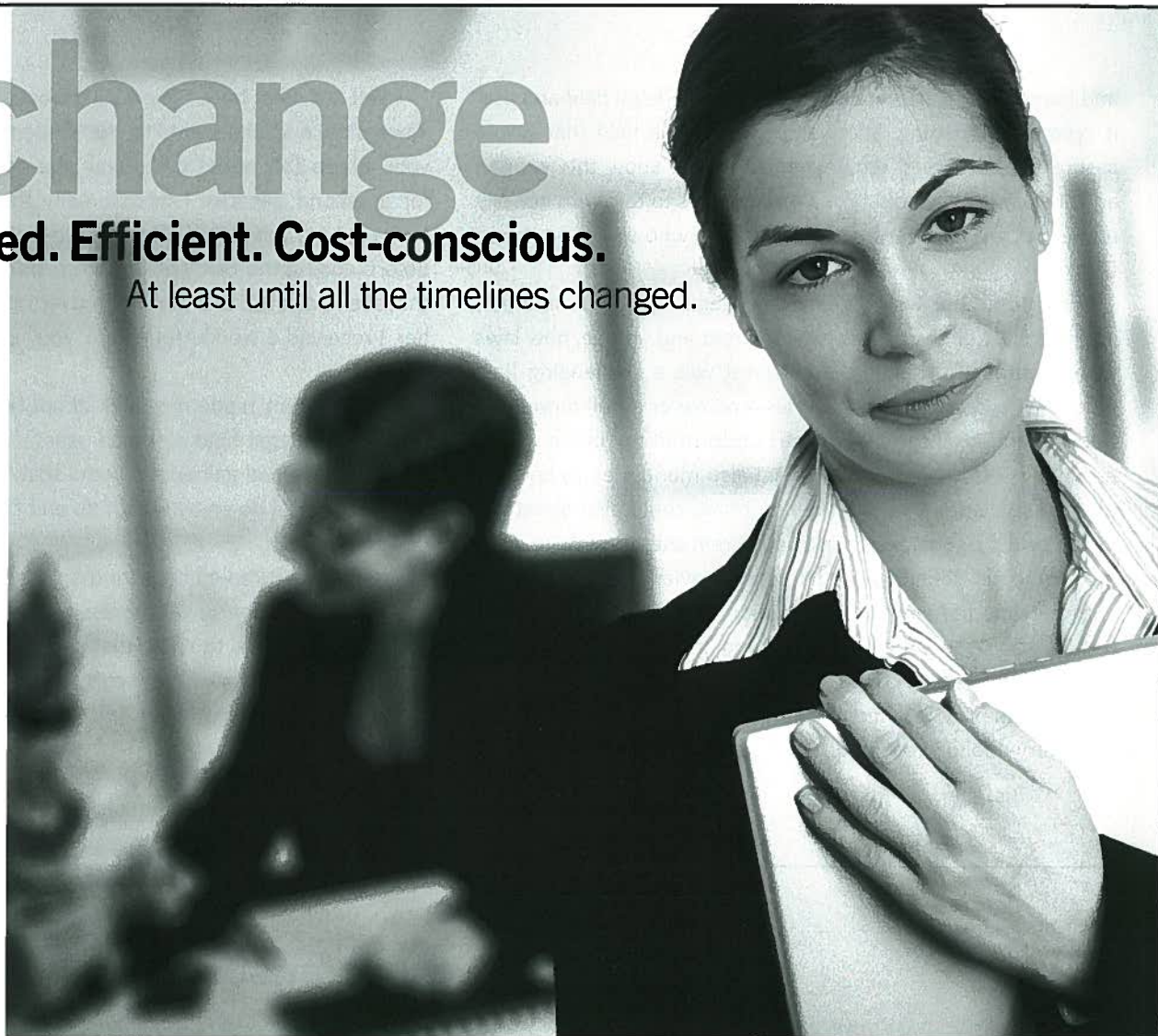
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 Email: liz.adame@sbcglobal.net

FAMILY LAW

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Speaker: Daniel E. Eaton, Esq. – *Seltzer Caplan McMahon Vitek*

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

Saturday, February 27, 2010 — 10:30 a.m. to 12:00 p.m.

LAW OFFICE ADMINISTRATION

"Privacy Issues in the Workplace"

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CRIMINAL LAW: *"Liar! Liar? Polygraph Examinations"*

Speaker: Paul Redden, Polygraph Examiner – *San Diego Polygraph*

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

Saturday, February 27, 2010 — 4:00 p.m. to 5:30 p.m.

PROBATE & ESTATE PLANNING:

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Send to: Leslie Ames, CCLS, Probate/Estate Planning Section Leader
 4248 Crestview Place, Eureka, CA 95503
 (O) 707-442-2927 FAX: 707-443-2747
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TRANSACTIONAL LAW:

***"Real Estate Purchase Contract--
Do You Know What It Means?"***

Speaker: Byron Cornelius, Esq. *Remax Real Estate Consultants*

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Send to: Mae Brooks, CCLS, Transactional Law Section Leader
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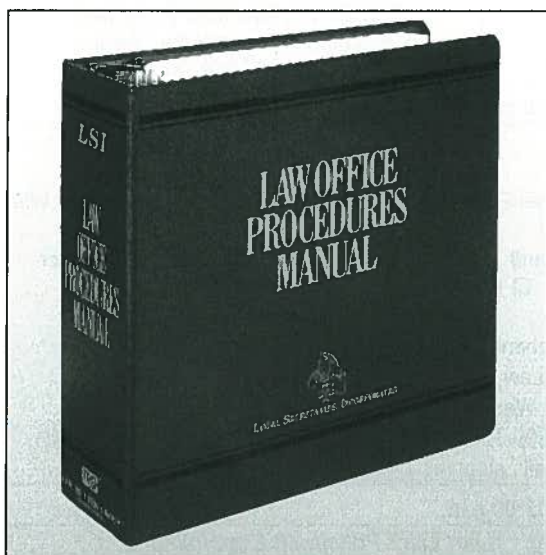
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Become an Officer of Legal Secretaries, Inc.

BY LORRAINE BETTENCOURT, PLS, CCLS

Have you given any thought to running for office of Legal Secretaries, Incorporated? If so, consider not just the duties of Treasurer of LSI, but the duties required in each step along the way to the presidency. Each office holds its own special challenges and has its own rewards. When considering a run for LSI office, it is essential to keep each position in mind, and assess whether you have the motivation, skills and passion to accomplish the tasks relevant to that office.

Do you possess the information and skills required to serve LSI as Treasurer, i.e., knowledge of computer accounting systems, experience with bill paying and check deposits, familiarity with certificates of deposits and dealings with financial institutions, budget preparation, etc.? As Treasurer you are in charge of all of LSI's finances, and it is also your duty to process all expense claims, and maintain all per capita tax and membership records.

How is your command of the English language – do you have a good working knowledge of grammar, punctuation and spelling rules? As Executive Secretary, you must be able to take notes at the Executive Committee meetings and all Board of Governors meetings, and turn your note taking into an accurate and well written record of what transpired at our meetings. You obtain the information needed to provide the Official Notice for each LSI conference, and you maintain the Index of Motions – a listing of all motions carried throughout LSI's history. In addition, you are the liaison with the local association Governors, and the moderator of the Governors' lunch. How are your people skills? They are essential for each and every rung of the LSI ladder.

As Vice President, you are the local association counterpart for membership and programs. You must develop a good rapport with

the members of each association, providing them with the information and continuing education they need to keep their associations thriving. You also moderate the local association luncheons at quarterly conferences. As if that weren't enough to keep you busy, you are the coordinator of the Marketing Committee. It is your responsibility to ensure that our website is kept current, and our benefit providers satisfied. You help steer the other Marketing Committee members in ways that assist them in marketing our association through continuing education programs, the California Certified Legal Secretary® program, and our publications. Our Marketing Committee Coordinator also organizes the booth volunteers and materials for the State Bar Annual Meeting.

As President, you will appoint all chairmen and appointed officers of our corporation. You will oversee them and provide them the support and guidance they need to perform their duties. You will work hand in hand with the presidents of the local associations, and make yourself available to any member, officer or chairman who may require your assistance or counsel. You will serve as moderator of the Presidents' luncheons at all quarterly conferences and conduct the business of the corporation at each quarterly and annual conference.

Every officer is expected to visit local associations whenever possible throughout the year, serving as a guest speaker, an installing officer or marshal, or attending a special function or membership meeting as a guest.

Does the idea of serving LSI as an officer still sound enticing? There is an inordinate amount of work required each step along the way – many hours of time are devoted to the corporation by each officer. It is essential that



LORRAINE BETTENCOURT
LSI EXECUTIVE ADVISOR

Lorraine Bettencourt is a native Californian. She resides in Atwater with her two cats, Gabby and Tabs. She has been employed in the legal field for 30 years as a legal secretary. Lorraine is a Past President of Legal Secretaries, Incorporated, and currently serves as Executive Advisor. A member of Merced County Legal Professionals Association, Lorraine works at the law firm of Charles Rayburn Wilson in Merced, where she practices the area of probate/estate planning.

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BELINDA OWENS
SDLSA Conference Chair

Belinda Owens began her Legal Career 10 years ago as a Receptionist with the Law firm of Barker Thomas & Walters. She moved on to The Maxham Firm in 2003, where she worked as the Legal Secretary for a boutique patent prosecution firm under the direction of Lawrence Maxham. Belinda currently works in the legal department of Gen-Probe Incorporated (a Bio-tech corporation) as a Patent Assistant. She has a son Troy and 2 daughters Tracy and Katie. Belinda enjoys traveling, and spending time with her family.

Fiesta del Sol Party of the Sun

BY BELINDA OWENS

San Diego Legal Secretaries Association (SDLSA) will be hosting the 3rd Quarterly LSI Conference on February 26-28, 2010, with the theme being "Fiesta del Sol (Party of the Sun)." We will be meeting in Mission Valley at the Mission Valley Doubletree Hotel. The activities will start on Friday, February 26, 2010, at 12:00 noon and continue through Sunday, February 28, 2010, at 12:00 noon.

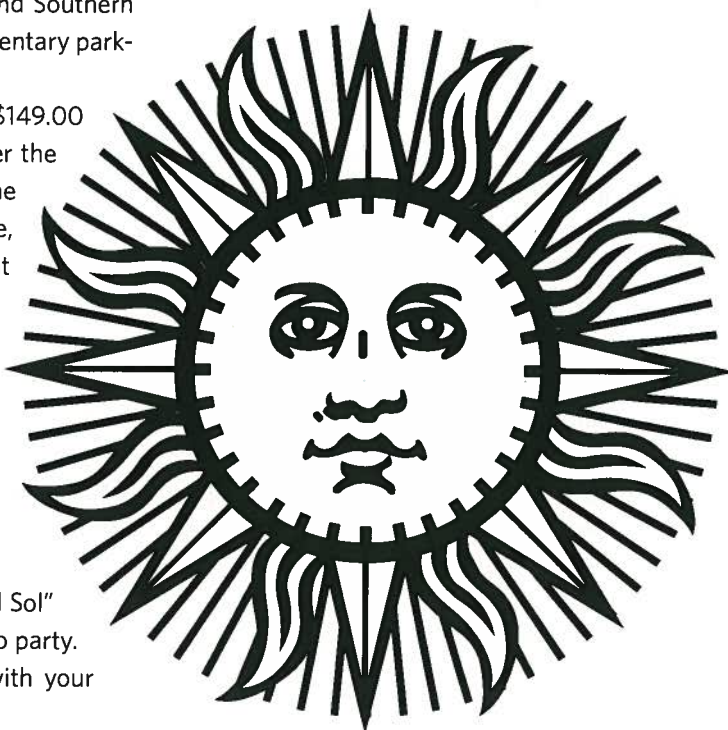
The hotel is located in Mission Valley just between two very nice shopping malls, Mission Valley Mall and Fashion Valley Mall to the west. There is a trolley stop right outside the hotel. The Doubletree Hotel San Diego-Mission Valley is just a short Trolley ride away from Gaslamp District or Old Town or even Tijuana, Mexico. The Doubletree offers a free shuttle from the airport to the hotel. As an added bonus, for those that are flying in to San Diego, Knox Attorney Service will provide courtesy limo service on Sunday. (For the limo service, you must sign up at the SDLSA registration desk). For our local and Southern friends, there is plenty of complimentary parking for hotel guests.

Doubletree group room rate is \$149.00 and is good for 3 days before/after the conference, so if you want to come early or stay after the conference, you can visit with the animals at the World Famous San Diego Zoo, SeaWorld and the Birch Aquarium, La Jolla; to make your hotel reservations you may call the hotel directly at (619) 297-5466 or online at <http://doubletree1.hilton.com> and the group code is: LSA.

Within the theme of "Fiesta del Sol" there will be many opportunities to party. But most importantly, included with your

scrip ticket is the Welcome Reception with hors d'oeuvres, Saturday's Board of Governors meeting, which includes welcome speaker Midge Costanza, Public Affairs Officer of the Office of the San Diego District Attorney, Saturday Banquet with special activities, and Sunday's brunch, and about 20 exhibitor tables (with free stuff), drawing prizes, and your very own personalized name badge. Also offered at the conference are six educational workshops, along with a local association and CCLS workshop. The Governor, President, and Membership luncheons will be held on Saturday afternoon. We will round out our conference with a Sunday morning brunch and a celebrity guest speaker you will not want to miss.

If you have any questions or need additional information regarding the February 2010 LSI 3rd Quarterly Conference, please feel free to contact me via e-mail at belindao@gen-probe.com or via telephone at (858) 410-8951. **LS**



"California Dreamin"

Omnibus Conservatorship and Guardianship Reform Act of 2006

BY RICHARD C. CARLSON—SUBMITTED BY SAN MATEO COUNTY LSA

Working as a Court Investigator at Superior Court of California, County of San Mateo since 1990, I learned about the reforms that were introduced in guardianship and conservatorship law that preceded my employment. In those days, reform really seemed to mean a change for the better.

Probate conservatorships have been around for a long time in California. They were enacted into law in 1957, the same year Elvis Presley started getting popular on the music scene. Prior to that time, there were only guardianships in California (Prob. C. Division 4) with an adjudication of "incompetency." Adult guardianships and conservatorships continued side by side until guardianships with the incompetency stigma were finally ended. As a result, nowadays, the law only states a person lacks capacity rather than declaring a person incompetent.

Senior citizens were the bulk of the people being placed under conservatorship and without any real oversight. During the 1970s, the Grey Panthers, whose main area of focus was the protection of the interests of seniors, became active in California and helped to implement more changes in the law. A survey done in Los Angeles County found that 93 percent of adults under conservatorship never appeared at the appointment hearing and 97 percent were not represented at that hearing. On July 1, 1977, AB 1417 became effective. It created the Office of Court Investigator and put new criteria into statute regarding the appointment of a conservator, expanded noticing requirements, and limited excuses for nonattendance of a proposed conservatee at a hearing. The new law created a procedure for review, the right to counsel, and the right to trial by jury. Probate Code Divisions 4 and

5 were repealed and a new Probate Code Division 4 was created with new laws related to the creation and monitoring of guardianships of minor children and conservatorships of adults. Since that time, guardianship and conservatorship law has evolved.

The Court, if appropriate, would appoint family members to act as conservators for their loved ones. A public guardian would be appointed when adults had no one else to care for them and public conservators were often the only source of help for elderly persons with little or no money. In the beginning, its services were provided free, courtesy of county taxpayers. However, in the 1980s, county funding for the public guardian began to dry up. In the 1990s, public conservators, who had difficulty meeting the demand of managing the affairs of physically or mentally disabled adults, began collecting income directly from the conservatees' estate when possible. Along the way, for-profit private conservators, who already existed, grew in number and were largely unregulated. On January 1, 2000, the legislature introduced a reform that required private professional conservators to register with the Department of Justice in addition to county registration. It is noted that some adults with more sizeable estates preferred to nominate a corporate fiduciary to serve as their conservator such as a bank or trust company.

In November 2004 the Los Angeles Times published a four part series, "Guardians For Profit," that rocked the California conservatorship system. Part One, "When a Family Matter Turns into a Business," is particularly critical of private professional conservators saying, "... Lawmakers and judges did not foresee that pro-



RICHARD C. CARLSON

Richard C. Carlson is an MSW Social Worker (San Francisco State University 1985). He worked during the 1970s/1980s in child welfare services with San Mateo County Children's Protective Services. In 1990, Superior Court of California, County of San Mateo hired him as a Probate Court Investigator to conduct Probate relative guardianship investigations and conservatorship investigations. In 2006 he was promoted to Chief Court Investigator and helped to implement the 2006 Omnibus Conservatorship and Guardianship Reform Act. He is planning to retire in March 2010.

Continued on page 28



BEATRICE BALLANCE

Beatrice Ballance has been working in the fitness industry for more than 20 years.

She is certified with the American Council on Exercise, Aerobics and Fitness Association of America, American Red Cross, CPR, Certified Nutritionist with American Health Science University, Certified Nutrition Specialist with Lifestyle Management Association.

She is recognized as a "Master Level" Personal Fitness Trainer with the International Association of Fitness Professionals. She writes a monthly newsletter, *Skin & Tone*, and teaches jazz dance, body sculpt and advanced cardio/jam aerobics classes. She can be reached at www.balancebodyworks.com

Getting the Most Out of the 2010 February Quarterly Conference

BY BEATRICE BALLANCE

As time goes by," the song lyrics go, the volume of the brain's gray matter, which is rich in nerve cells, drops as we get older. Hey! It's dropping right now! Brain cells are more sensitive than other body cells to nutrients and chemicals, which determine any given moment how the brain functions or malfunctions. Perhaps you find you are having trouble remembering particular terminology, or the name of that acquaintance you made recently. Maybe the words to that song that is so familiar can't come to mind. Did you have to stop to remember where you left your keys, or what to pick up at the store?

TIME FOR...BRAIN FITNESS!

At the 2010 February Quarterly Conference there is much for you to remember. You are in an unfamiliar location. There are many time schedules to meet, new faces, new facts, and fresh innovative business strategies to remember. This requires a sharp memory, along with plenty of energy to sustain you all three days at the conference.

Here are some brainpower boosters to help keep your brain from sending you on memory overload.

The more physically fit you are, the bigger the portion of the brain that stores "relational memory." That's remembering where you met somebody, where you read something. That kind of memory diminishes as we age, says Dr. Arthur Kramer, professor of human perception and performance at the University of Illinois. To enhance your relational memory abilities, schedule in a brisk walk for 30 to 60 minutes every day of the conference. A walk around the conference grounds in the beautiful San Diego

weather would be great. Or, if you can get to a gym, use the treadmill, stationary bicycle, or elliptical machine for a vigorous aerobic workout. But there is more to brain fitness than just an early morning stroll.

What you eat every day while at the conference makes a huge difference in mental power. You need to keep your weight and especially your waistline under control. That spare tire around your waist may spell trouble for your brain.

Mary Haan, professor of epidemiology at the University of Michigan School of Public Health says that your middle-age waistline matters. That spare tire damages the brain. It's the deeper layer of visceral fat cells in the tire that are at fault. Visceral fat is an active organ, producing hormones that can cause higher insulin levels. Too much insulin in your blood can lead to Type 2 Diabetes, which is so closely linked to dementia that some researchers call dementia "Type 3 Diabetes."

Did you know that memory lapses can be caused by high blood pressure? "Hypertension in midlife is almost certainly a risk factor for dementia," says David Knopman, professor of neurology at the Mayo Clinic College of Medicine in Rochester, Minnesota. It harms the brain by causing strokes, blocked or burst blood vessels that kill brain cells by cutting off their supply of oxygen.

Because the stress level may be high at times during your three-day meeting that does not mean it is OK to over eat. Or worse, practically starve yourself during the day and pig out in the evening.

To keep a steady supply of caloric energy, begin with a small but health-conscious break-

fast. Remember that if you choose the pastries or other high-sugar temptations and coffee to start your day, you will crash within two hours, hungrily searching for a pick-up fix! Instead, choose eggs, perhaps an egg white omelet. Choose a whole-wheat bagel or English muffin, oatmeal, cereals, and skim milk.

The more physically fit you are, the bigger the portion of the brain that stores “relational memory.” That’s remembering where you met somebody, where you read something.

Yogurt with fruit is a good start. Then take along an apple, banana, or other fruit, and a package of trail mix or nuts for a mid-morning snack. This will hold you until lunch.

During the day it is important to stay vigilant about how you feel physically. It is not uncommon to nod off in those morning or afternoon meetings. This often happens because you are hungry. Beware! If you find yourself with that “empty stomach” feeling and you are not scheduled to eat for a couple of hours, you are now set up for disaster.

You are running out of energy. The brain and red blood cells need carbohydrates to function properly. Your mental capacity and your energy are depleted, you are running on half-empty, and you probably feel sleepy. It cannot use your body fat for energy, so to keep operating the body will go to muscle for its energy source, which does not foster good health in the long run. For optimum mental well being, keep satiated and hydrated at all times. Remind yourself to eat before going anywhere and think ahead about your meal plans.

WHEN ORDERING YOUR MEALS KEEP THESE GUIDELINES IN MIND:


Instead of soft drinks, fruit drinks and fruit juices, sometimes switch to water, unsweetened coffee or tea.

Go for the whole grain breads instead of refined grains and sweets at your meals.


Replace some of those red meat meal choices, especially processed meats (sausage, bacon, ham, hot dogs, etc.) with seafood, poultry beans or soy foods.

Try to limit your alcohol intake while you are there. Alcohol depresses your central nervous system and acts as a sedative. Excessive drinking can harm brain function while those empty, no-nutritional-value calories will store as fat.

Consider drinking more coffee if it doesn’t make you jittery. Gary Arendash, scientific researcher at the University of South Florida in Tampa says that coffee does much to protect the brain as it acts as an anti-inflammatory agent in the body.

Catch those ZZZZs! Try and revitalize yourself during the day if you can by taking a quick 15 to 30 minute nap. It will refresh you and keep you mentally alert for those evening dinners and social events. Have a fruitful and memorable three-day conference! 

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CCLS – WORKSHOP REGISTRATION FORM

February 26-28, 2010 – LSI Quarterly Conference – Doubletree Hotel, San Diego, CA
Hosting Association: San Diego LSA

CCLS WORKSHOP
FRIDAY, FEBRUARY 26, 2010
5:00 p.m. – 6:30 p.m.

TOPIC: Law Office Administration. LSI welcomes you to join us and learn about records management, computer technology, office etiquette, personnel management, office equipment, filing styles and techniques, indexing and file management, and computer terminology. This workshop is not only for those studying for the CCLS exam, but can also serve to help any individual looking to further their education.

MODERATORS: Astrid B. Watterson, CCLS – LSI CCLS Chairman
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Please Make Check Payable to LSI. Mail registration to: Astrid B. Watterson, CCLS, Somach, Simmons & Dunn, 500 Capitol Mall, Ste. 1000, Sacramento, CA 95814;

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MIKE MURRAY

Mike Murray is the National Training Director for Barkley Court Reporters and has been in the legal technology field for five years. Mike graduated with a B.A. from The School of the Art Institute of Chicago in 2002. He currently conducts MCLE seminars for law firms throughout the state of California and New York.

He is a visiting faculty member for the Institute for Paralegal Education and a guest lecturer for San Francisco State University. Mike is proficient on numerous litigation and trial presentation software programs including Adobe Acrobat, LiveNote, Transcript Manager Pro, Summation and Sanction.

He works closely with Barkley's trial presentation team. Mike provides training to Barkley's employees and reporters, as well as attorneys, paralegals and legal support staff.

Making the Most Out of Adobe Acrobat

BY MIKE MURRAY—SUBMITTED BY SAN DIEGO LSA

It is quite deceptively simple. Upon running Adobe Acrobat, there seems to be only a handful of buttons, leading you to wonder, "How much could this software really do?" The answer is, "A lot!" It is truly amazing how much functionality there is packed into this simple package. In fact, there are many ways this simple tool can save you tremendous amounts of time.

In the legal profession, PDF has quickly become the universal electronic document format. It is used in most local and federal courts as the format for e-filing, many of the forms you complete are in PDF, and it is a great method for electronically delivering documents to clients.

As a court reporting company, we have started using PDF to deliver our transcripts. In fact, this versatile format has enabled us to offer a paperless transcript (GreenTranscript™), which was eagerly adopted by numerous clients trying to go paperless.

E-Transcript previously was the format for electronic transcripts; however, PDF transcripts include many more features. For instance, we can bundle the exhibits with the transcript in one file, include an interactive word index, and even hyperlink the exhibits to the transcript text (i.e., when "Exhibit 14" is mentioned, users can click it to actually view Exhibit 14). These features usually required expensive legal specific software but are now in every transcript we deliver. We have greatly benefited from this multifaceted, universal format.

As a legal professional, there are ways you can benefit as well. Aside from an enhanced PDF transcript, there are tools within Adobe Acrobat designed specifically for you. We will look at one of these legal specific tools that is becoming a very popular use of Acrobat for law firms: Redacting.

REDACTING PDFS

The process of removing sensitive information -- redaction -- can often be a chore. Many people sit for hours with a black marker or paper-tape covering sensitive information (Social Security numbers, credit card numbers, names, etc.). This is a very arduous process, and can even result in accidentally missing something, which is why firms will have multiple people review documents, multiple times. Hours and hours of monotonous work.

Figuring there has to be a better way, some firms are using the computer to redact. However, they are not properly redacting the sensitive information, resulting in public embarrassment and, even worse, possible legal action. Unless you are using the Acrobat redaction tool, or another product *specifically* created for redaction, you are probably not redacting properly on the computer. Changing font colors, overlaying text boxes, etc., does not permanently remove the data and can result in sensitive information being easily revealed.

To redact in Acrobat, you will again need the Pro version of the software. It is recommended that you OCR your document first (make the text searchable). To do this, go to the *Document menu*, *OCR Text Recognition* and then choose *Recognize Text Using OCR*. The reason to OCR will become apparent as we begin redacting.


Start the redaction process by turning on the Redaction toolbar. This can be done under the *Advanced menu*, *Redaction* and choose *Show Redaction Toolbar*. Before we actually start redacting, set the appearance of the redaction by clicking the *Redaction Properties* button from the toolbar. Here you can set the redaction color and what text will overlay the redaction. Once that is set to your preferences, click *OK*. Then choose the *Mark for Redaction* tool from the toolbar. This is similar to a high-

lighter, and is used by simply selecting the areas to redact. Upon first glance, this does not seem to be much faster than a black marker. That is because the real power of this tool is accessed by clicking the *Search and Redact button*. This will enable you to search for words, and then automatically redact them on the open PDF or even a whole folder of PDFs.

First, Acrobat can search for a single word or phrase to redact (a name, word, etc.). Next, Acrobat can search for a list of words or phrases; very helpful if you have a long list of names or words to redact. Finally, the most powerful feature can search for patterns. This means without even knowing them beforehand, it can locate Phone Numbers, Credit Cards, Social Security Numbers, Email Addresses and Dates simply by the pattern of the characters. Within seconds, Acrobat can scan hundreds of pages and locate and redact all these items based on their pattern. These search options are located as radial buttons in the window that appears after clicking the Search and Redact button. This redaction tool is faster than a human can read, and will not miss any items due to fatigue.

Once everything is marked, it is time to apply the redaction. Click the *Apply Redactions button*. You will be warned that once you save the file, the data behind the redactions will be removed *permanently*. It is highly recommended that you save a *copy* to preserve your original file. Once the redactions are applied, you can be confident that your electronic document is properly redacted and ready to be sent along.

IN CLOSING

It is easy to see with just this one feature how much power is hidden in that simple Acrobat interface. There are even more features within Acrobat that can improve your daily tasks. I encourage you to explore how PDF can transform and improve your business, just as we did at Barkley Court Reporters. Also, Adobe publishes a great blog that offers tips and tricks for the legal profession, excellent articles and even training videos. I highly recommend this site: blogs.adobe.com/acrolaw. 



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CAREY ROWAN

Carey Rowan is the Director of the Contra Costa County Public Law Library and has a master's degree in library science from the University of Southern California. She lives in the San Francisco Bay area. As the Director of the Contra Costa County Public Law Library, she is on a mission to ensure that everyone is aware of county law libraries and the resources and services they have to offer.

Aside from library work, her passions include reading, writing, vegetarian cooking, church work and animal rights.

From Novice to Expert: Strategies to Assist Staff in Doing Legal Research

BY CAREY ROWAN—SUBMITTED BY SAN MATEO COUNTY LSA

While the assigned duties of a legal assistant or law firm secretary may vary from one office to another, legal research is often part of the job description for support staff in a busy law office. The request for research may appear in one of several ways. An attorney may instruct an assistant to "find information on toxic torts," or a member of the support staff team may find a note scribbled on her desk asking for "Bakke and related." Sometimes an attorney will request specific case law and include the citations. In other words, the request may be quite precise or it may be general. If you are a secretary or paralegal unaccustomed to doing research, your first instinct upon receiving such an assignment may be to go into panic mode. But, as this article will show you, there is no need for a meltdown. Research can be an interesting and enjoyable component to the job, but, like anything else, it involves skills which must be learned. Because research is a critical element of the practice of law, a staff member with sharp skills in this area makes himself or herself much more indispensable to the boss and to senior management.

Here are some recommendations designed to assist support staff in learning to do legal research and becoming proficient and comfortable with the process.

DO THE NECESSARY PREPARATION. Preparation involves doing the requisite background work and getting organized. Being properly prepared can save you time as well as helping to ensure a successful outcome. Here are the suggested steps to follow after you have

obtained the necessary clarification of your assignment:

Assemble the required materials. Be sure to include your notes, at least two pens, a high-lighter, post-its, a notebook, and any other "tools" needed. I recommend using a large envelope or folder to keep papers and materials together while working on a research project.

Make certain you understand the assignment. Obtaining clarification is one of the most critical steps in research. Unless you are absolutely certain of what the attorney wants, ask for additional information. Some examples of questions to ask are:

- Are there other (related) terms applicable to this subject matter?
- Do you need both primary and secondary sources?
- How in-depth would you like me to research? Do you want as much material as I can find, or will 1-2 sources be sufficient?
- Do you want both current and historical content?
- What is the timeline or deadline for this assignment?

Identify or define your topic. You can either do this at your office or at the library, or by a combination of both. There are several ways to accomplish this. Three of the most common methods are use of the Internet, use of a legal dictionary and use of a legal encyclopedia.

If you encounter a term that is completely unfamiliar to you, try accessing the Internet, going to Google, and typing the term, followed

by a dash, and the word "definition." This is easy to do and may give you a basic definition of the subject in question.

Legal dictionaries have always been an excellent source of definitions for legal terms and phrases, and a logical starting place for legal research. One of my favorites is *Black's Law Dictionary*, now in its 9th edition. If there is a copy in your office, by all means consult it. If your office does not already own a legal dictionary, you may want to inquire about purchasing one. Chances are the public law library will have *Black's* or something equally helpful. In fact, many general public libraries carry *Black's Law Dictionary*. Looking up the term in a dictionary can be both informative and clarifying and is highly recommended, whether it is done at the office or at the library.

For many people, the thought of using a law library is intimidating. Keeping in mind that public law libraries exist to provide service to the people who need it should help make the process more inviting.

Looking up the term in a legal encyclopedia such as *American Jurisprudence* (Am Jur) or *Corpus Juris* is another excellent way of obtaining an introduction to the subject. Again, this step can help define and clarify the subject as well as pointing you towards additional sources of information, particularly relevant cases. If you have these sources available in your office or at your in-house library, either in print or online, by all means use them. If they are not available at your workplace or if you do not know how to use them, plan to consult them at the law library.

Utilizing these practices will help you become familiar with legal terms and concepts.

KEEP A RECORD OF YOUR RESEARCH. This step is often neglected, especially by inexperienced researchers. But it is important and can save time. One simple way to establish and maintain a record is to jot down the title of each source consulted along with a symbol, perhaps a plus or a minus, to indicate whether or not it was useful in locating the information needed.

When taking notes based upon what you have read in a book, write down basic bibliographic information (author/title/publisher/date) about the book somewhere on the page, such as in the top corner or at the bottom. Don't forget to include page numbers. The same is true for pages photocopied from books. Always note the bibliographic information somewhere on the page (back of the page or at the top or bottom). People often return to the library and want to use a source they have previously consulted. It is much easier to locate the book if the bibliographic information is available.

USE THE LIBRARY. By now you've been given a challenging research assignment. You've asked your boss the right questions and obtained sufficient clarification to proceed. You've assembled and organized everything you need in order to do the work. You've reviewed the research materials available at the office and found you need to do further exploration. It is at this point that you may realize you need the services and resources of the library. If you are lucky enough to work for a firm that has its own law library as some larger law firms do, you may be able to find what you need by utilizing this resource. However, even the best of law firm libraries usually do not have the budget allocation to subscribe to all of the materials attorneys and staff will need. It

is, therefore, not unreasonable to assume that you will need to use the public law library on occasion. If your workplace does not have an in-house library, you may find you need to become a frequent customer at the law library.

For many people, the thought of using a law library is intimidating. Keeping in mind that public law libraries exist to provide service to the people who need it should help make the process more inviting. Using the library is like anything else: adequate preparation and planning will help greatly. Also, the more you use the library, the more comfortable you may become with it.

Planning your trip to the library might include checking the library's website or calling the library to determine basic information such as hours of service, location, parking arrangements, and other useful information. Many library users prefer to call the library prior to a visit and speak to staff about the nature of their research. Doing this may give the librarian an opportunity to assemble some materials for you to use when you visit. It also provides an opportunity to ask questions and can save time.

You will also need to schedule your trip so that you have sufficient time to do the research you need to do. If you plan to make photocopies or printer copies, you may need to bring change or your office copy card if one exists. It goes without saying that when you visit the library you will need to bring the folder or envelope with your notes and any material you have already located.

Once you have planned your trip to the library, found the location, and even located a parking space near the building, you may find yourself at the front door to the library, wondering what to do next. If this is your first trip to the library, it is rec-

ommended that you check the area near the entrance for signs. Reading the signs is a good way to start familiarizing yourself with the library. Many libraries also have useful pamphlets and brochures which give good basic information about the library and its services. These are usually free to library users and can contain a great deal of useful information. Don't be shy about taking such handouts to read now or later.

Your next step is to find the public service desk, often called the Reference Desk or the Information Desk. This will vary from library to library. Some libraries feature a counter with staff and equipment behind the counter. Others will have an actual desk where the librarian or other staff members sit. It should be simple enough to approach the public service desk, introduce yourself, explain what you have been asked to research and that you need help getting started. If this is your first visit to the library, let the librarian know this so that he or she will be aware of your need for additional directions and details. Remember, the primary purpose of library staff is to assist people who need help.

If you are already familiar with the library, you can delve into the research on your own. But do not hesitate to talk to the staff if you have any questions at all. Even if you find plenty of material, I recommend talking to the librarian to see if there is something you may have missed.

One step you will not want to skip is learning about the library's catalog. Nowadays most libraries, including law libraries, have online catalogs, although a small percentage still use manual or card catalogs. Unless you are already familiar with this valuable finding aid, you will want to ask the librarian for instruction in its use. The purpose of the catalog is to assist staff and library users in locating material. A library catalog typically lists material by author, title and subject. There will usually be a call number, which may be a Library of Congress number or a Dewey Decimal System number, since these are the two most commonly used library classification systems. Theoretically, the material can be found on the shelves in call number order, but in actuality most libraries have special collections and space constraints and other reasons why material is not always shelved in call number order. The catalog card or record may contain other location codes, as well as information about the library's holdings for a particular title, for example, whether or not the most recent issue or edition of a publication is available, and a description of the format of the material. Again, ask library staff any questions you have about the catalog, or where to find material.

BE THOROUGH. Approaching legal research as a hasty process is usually a mistake. Being thorough will result in an end product which is more accurate and professional, and therefore, more valuable to your boss. Here are some tips to help make certain your work is thorough:

Evaluate your findings. If the material you have located appears to

be too thin or sketchy, trust your instinct. Don't be afraid to ask the librarian if there are other sources which can be checked. Libraries generally have material in multiple formats. What is not covered in a book may possibly be given excellent treatment on a CD-Rom or an online subscription service.

Once, when I was searching for information on a particular topic, I looked at dozens of sources but could not find the information I needed. Finally I decided to check an index for law review articles and I found a lengthy, detailed treatment of the subject. The moral here is that perseverance usually pays off.


Shepardize any cases you pull. If you locate cases which you feel are on point, remember to Shepardize them. Shepardizing is the process by which you determine if the case is still good law and has not been overturned. If you are unfamiliar with Shepardizing, ask the librarian to help you.

Also, if you find a case which looks useful but the status of the case is "unpublished," be certain you indicate this if you decide to copy the case for the attorney.

Check printer copies and photocopies prior to delivering them to the attorney. Examine any copies you make to ensure that they are legible. Take the time to collate and staple together appropriate pages. And always indicate the source in which you found information. Remember, it has been said that excellence is in the details.

Finalize your work and present it in a professional manner. Prepare a cover sheet or even use a handwritten note to accompany the material you give the attorney. Make certain you sign or initial the cover sheet or cover note. I also recommend using a file folder, or placing the material in an envelope, depending on the policies and practices of your law office. In other words, be professional.

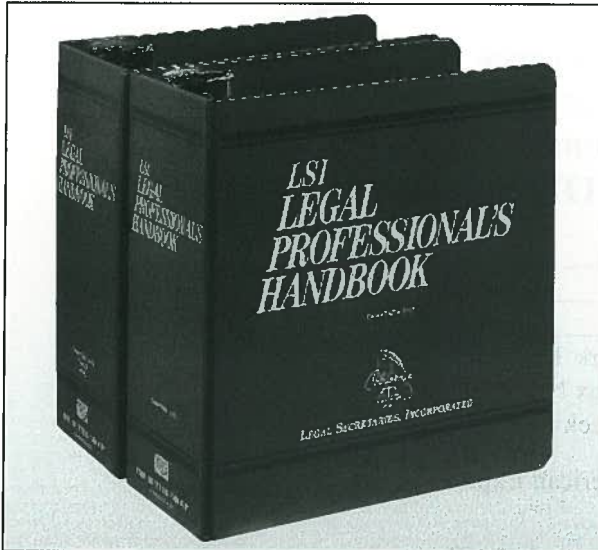
Ask for feedback. Last but not least, ask the attorney for feedback and let him or her know that you are available for additional research if the need arises. Creating and maintaining this type of dialog will serve to make future assignments easier as well as conveying your willingness to be a part of this very important process.

The methodology outlined here will help introduce the novice researcher to legal research. Those who have experience in doing legal research may find some hints here which will streamline or facilitate the process. By understanding the assignment itself, preparing and organizing, getting to know the law library and using it without hesitation, being thorough and professional and following up on the research, your job will be more enjoyable and your worth to your employer will increase accordingly. 

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LSI Second Quarterly Conference 2009







MAXINE MARCHUS

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

Marketing Yourself, or How to Stand Out Positively

BY MAXINE MARCHUS—SUBMITTED BY MERCED COUNTY LPA

Much has been said about reviewing, updating, polishing up, and presenting a resume that will stand out to the person in charge of finding the perfect new employee. There must be websites that are boilerplates for objectives, where you simply change adjectives to fit the job description and complete your history.


But apparently what you don't get from these websites is a suggestion to review, update, polish up and present yourself in a way that will stand out in a positive way.

I recently had the experience of finding a replacement for an employee who was leaving for a different opportunity. Because of the current economic climate I was expecting a flood of applications, and I was not disappointed. I specifically asked that resumes be hand delivered, rather than mailed in. If I was not in the office I asked our staff to give me a short note of their impressions of the applicant. This in itself made for some pretty interesting reading, and gave an early indication of who might be a good fit and who might be a major personality problem. In a small office it is just as important to "fit" as it is to have the skills to perform your duties. In fact, I sometimes feel it is even more important. If you have a positive, upbeat personality, get along with everyone, and are working hard, co-workers are more patient and willing to help you learn your duties and answer your questions.

If an ad requests that you hand deliver your resume, always assume that the hiring person just might be the person accepting it. Even if he/she is not, you can bet that the receptionist will make a comment to her if you arrived in dirty torn up pants and a sloppy sweatshirt and looking like you just rolled out of bed. You don't need to be dressed to start working, but you definitely should have a neat and clean appearance.

After accepting a resume I made a note with a grading system of 1-5 based strictly on first impression before even reading the resume. The belief that first impressions are so important is very true when it comes to seeking employment. When you have over a hundred resumes that grade based on first impression is a big part of what will get you an interview. I learned that the information included in a resume is not always what it seems. One applicant had an incredible history, worked in a two attorney office similar to ours, listed duties for exactly what I was looking for, and had a great business appearance, and was willing to start at an entry level salary! She seemed too good to be true. I looked for a phone number for her reference since she didn't include one. No listing for the law firm. Looked up the attorney's name on the California Bar site, no listing. Looked up the address on Google, guess what, it was the YMCA. Another applicant gave me the phone number of her previous employer. When I called him I was told that only if I had a release from her would he be able to give me a reference. Well, needless to say I never heard from her again.

So, finding someone with experience in the legal field turned out to be like looking for a needle in a haystack. Secretaries, assistants, and receptionists are hanging on to their jobs, even with furloughs in effect. The game of musical secretaries is on hold. The only employment opportunities happen when someone relocates, retires or has health issues.

How did my story end? I offered our position to someone with no experience in the legal field. Why? She presented a positive outlook during her interview, declared that she was a fast learner, was enthusiastic about the opportunity and made me smile. I guess I just went with my "gut feeling." 

Still All Jazzed Up

BY GLORIA LAMM—SUBMITTED BY PLACER COUNTY LPA

Shy: "...lack of confidence in association with others...timidity...when brought into prominence or notice...fear of failure, etc., and a hesitant, tentative manner as a consequence."

Yup, that's me. So what was I thinking almost two years ago when Capitol City and Placer County L.P.A.s' bid for conference was accepted, and I agreed to be a co-chair? I do recall someone commenting that it would mean time in front of a microphone. That wasn't a concern, since I had been a 20 year volunteer with 4-H and had often been in front of an audience with a microphone in hand. But, I'll be the first to admit that I'm more of a type C+ personality, content to sit back, take things slow, and keep the stress level to a minimum. What to do, what to do?

First, surround myself with greatness. We've all taken personality quizzes to see what we're like (as if we didn't already know), but it's very insightful to read the descriptions of the personalities that we're not, and even better, the instructions on how to work with other personalities. Everyone has a sense of greatness, in their own way.

I couldn't have asked for a better team! I was especially fortunate to have a good counterpoint in my co-chair, Michelle Rodgers. She is everything that I'm not: organized, detail oriented, focused. I'm an "introverted," "blue"! YIKES!!

Next, don't be afraid to delegate. Sometimes it's a challenge to delegate tasks to others. After all, can't we do it better, faster, or easier ourselves? The reality is, one person cannot do it all. But there's a caveat to that statement. Once a task is delegated, keep a respectful distance, and let the person complete the task. It's o.k. to be a follower, even when assuming the role of leader.

Learn to compromise. That's a biggie, and sometimes easier said than done, especially if you think your idea is best. Sometimes there are better options. Think Microsoft Vista.

Someone thought that was a great idea, too.

For a year and a half, tasks were delegated to my team of great committee members, but, before I knew it, conference had arrived. It felt like heading to a dental appointment; my insides were tied up in knots, and my brain, a week shy of 60 years old, was acting more like cottage cheese than gray matter. Although I had been to a few conferences, this was my first experience being on the planning committee. Thank heavens for organized, focused Michelle.

The first day of conference, I ran myself ragged. I was almost overwhelmed at times with all the details: is the room too cold, is the microphone in the right place, is the chef hunting us down with a kitchen knife because we've added 17 more dinners and 4 more lunches an hour before the meals? If you are really fortunate, (and we really were), you will have an outstanding hotel staff that will respond immediately to every request, big or small, without too much eye-rolling or sighing. We were especially thankful that the hotel allowed us to photocopy the résumé in the Sales and Catering office at 10:00 P.M.

Finally, be prepared for the unexpected. Conference went very smoothly, to my amazement; however, on Sunday morning, a few minutes before brunch was to begin, Michelle and I were standing just inside the front doors, wondering when our speaker was going to arrive. I asked Michelle how she felt about being the inspirational speaker. I do believe I saw a momentary look of fear in her eyes, until LSI President, Christa Davis arrived with the speaker in tow. Whew!

In retrospect, conference was everything I thought it would be, and so much more. Everyone on the conference committee was amazing (great just doesn't do them justice). I will look at future conferences in a new light. I will turn in my registration early, and I will take every opportunity to thank the conference committee on what a good job they are doing. **LS**



GLORIA LAMM

Gloria Lamm is a Legal Assistant at the Law Office of Lynn A. Dean in Roseville, which specializes in Elder Law and Estate Planning. Gloria is a member of Placer County LPA.

Become an Officer ... Continued from page 9

you have the support and encouragement of your family, your employer, and your friends. Without that support, your journey will be very difficult.

If you aspire to be an Officer of Legal Secretaries, Incorporated, I encourage you to consider all that will be required of you along the way, speak to past and present LSI officers to hear their story and ask for their guidance on how best to assess your passion and motivation. Above all, believe in yourself. Nobody

will believe in you unless you believe in yourself. Good luck in your bid, and remember each member of the Executive Committee is here to offer any advice you may desire.

At the February 2010 Quarterly Conference, a list of candidates for office for Legal Secretaries, Incorporated will be read. Nominations may be made from the floor. All qualified persons submitting Acceptance of Nomination forms received prior to March 16, 2010 will be included in the ballot to be voted on at the 2010 Annual Conference in Sacramento. **LS**

"California Dreamin'" ... Continued from page 11

professionals would turn what had been a family matter into a business." Part Two, "Justice Sleeps While Seniors Suffer," focuses on the Court system, saying, "Probate courts, which appoint conservators, are supposed to monitor their conduct, scrutinize their financial reports and fine or remove those who misuse their authority. Yet the courts have failed dismally in this vital role." Part Three, "For Most Vulnerable, a Promise Abandoned," addresses the lack of funding for the Los Angeles County Public Guardian's Office and Part Four "Missing Money, Unpaid Bills and Forgotten Clients," tells the story of how the Department of Veteran Affairs and California's probate courts entrusted a private conservator with dozens of vulnerable adults, most of them disabled veterans.

Chief Justice, Ronald M. George closely reviewed the newspaper's findings and called for more funding for the probate courts that monitor conservators. The California legislature passed key legislation, AB 1363, by Assembly member Dave Jones, D-Sacramento, the Omnibus Conservatorship and Guardianship Reform Act of 2006. The introduction to the reform act states that "the conservatorship system in California is fundamentally flawed and in need of reform." AB 1340 implemented additional reforms proposed by the Judicial Council's Probate Conservatorship Task Force. In September 2006, Governor Schwarzenegger signed the reform bill, a package of four bills, into law. Some (but not all) of its provisions that became effective July 1, 2007 are:

- Requires 5-day notice and service on the conservatee of 1) a notice of hearing on a temporary (emergency) conservatorship and 2) a copy of the petition and requires an investigation and a report by a Court Investigator before the appointment of a temporary conservator.
- Expands the scope of the initial conservatorship investigation, requiring the Court Investigator to interview the spouse or registered domestic partner and relatives within the first degree and, to the extent possible, relatives of the second degree, neighbors and close friends.
- Requires the probate court to review conservatorships at a noticed hearing six months after appointment of the conservator and annually thereafter.
- Requires the Judicial Council to develop qualifications and continuing education requirements for probate court judges, attorneys and court investigators.
- Enacts the Professional Fiduciaries Act, which creates a Professional Fiduciaries Bureau in the Department of Consumers Affairs and requires the bureau to license and regulate professional fiduciaries.
- Requires the conservator, upon appointment to file a *Level of Care Determination* that defines the appropriate level of care for a conservatee and measures that would be necessary to keep the conservatee in his or her residence.
- Does away with "secret moves" by making the conservator give 15-day prior notice before changing the personal residence of a conservatee to family members and within 30 days of any change of residence.
- To sell a conservatee's personal residence requires specific statements of whether the conservatee has the ability to live in the personal residence and why other alternatives (such as in-home care services) are not available.
- Requires accountings to include specific supporting documents, subject to random audit, and gives the court the power to order an investigation of conservatorship by a Court Investigator at any time the court deems it necessary.
- Professional fiduciaries required to file or lodge all original

account statements for the entire accounting period.

- Prohibits a conservator from being compensated from the estate for the costs or fees the proposed conservator incurs unsuccessfully opposing a petition.
- Prohibits a fiduciary, who has been removed for cause, from charging his or her litigation costs to the estate.
- An order appointing a conservator must include a notice of the conservatee's rights.

In August 2007 Governor Schwarzenegger used his line-item veto to cut 17.377 million that would have implemented the conservatorship reforms in the State of California. Those who supported the reforms had no notice that funding was on the chopping block and the governor's stated intent to fund the reform in the next year offered little solace. "It's more than a mere delay," Jones said, "We desperately need to have more court resources to oversee conservatorships. There will be seniors and others who suffer financial and physical abuse as a result of this." By the time the 2008 California budget was approved, the state was even deeper in debt and began cutting funding to local courts, funds necessary to carry out their day-to-day operations. In October 2008 the stock market declined dramatically as a result of a national and worldwide economic crisis and recession.

The conservatorship reforms introduced into the Probate Code in 2007 remain as California law but are not funded. In effect, the reforms of 2006 increased the workload of court investigators without providing the financial resources to hire additional staff. With significant reductions in trial court funding, local courts around the state have to lay off court staff. In September 2009 Superior Court, County of San Mateo County anticipated having to lay off 60 court employees, one-quarter of its staff, as a result of budget cuts; however, the actual number of employees laid off was twenty eight. The Professional Fiduciary Bureau is not adequately funded. Currently, the staff consists of a one-half position. It depends upon licensing fees to keep the operation running. California Licensed Professional Fiduciaries pay hefty fees to obtain and renew their licenses.

I titled my article "California Dreamin'" after the 1965 hit of the Mamas & the Papas. In those days, California really seemed to be an exciting destination, a place where reforms really meant a change for the better. However, in today's harsh economic times, California's Guardianship and Conservatorship Reform Act of 2006 appears not so much as true reform as "California Dreamin'." Reform is not possible if funding is on the chopping block.

In the fall of 2008, when the federal government began bailing out a number of failing financial institutions with billions and billions of tax dollars, I began to ponder how much is one billion dollars? I went to my computer, opened Google, and keyed-in, "How many millions does it take to make one billion?" What

appeared on my computer screen, in red, were 1,000 listings of \$1,000,000 in \$100,000,000 increments, i.e. 100 listings of \$1,000,000 under \$100,000,000 and so on. A billion is \$1,000 million and the cost of the 2008 government bailouts exceeds \$400 billion. The price tag for California's conservatorship reform in 2007 was \$17.377 million, a virtual drop in the bucket when compared to the government bailouts.

The U.S. population is aging rapidly and I myself, a war baby, born during World War II, plan to retire with millions of other war babies and baby boomers. Given the current trends of budget deficits, what protections will there be in adult protective services, in conservatorship or ombudsman programs, for those who might lose capacity and have to depend on others to manage their personal and financial affairs? Today, many private caregivers are not professionally trained and not regulated by any kind of agency. They place ads in newspapers seeking work in the homes of elderly persons. These elders are often at high risk of caregiver abuse in one form or another. Many skilled nursing facilities in California are older structures, built years ago, and are too small to meet the needs of an aging population. For the increasing number of elders who will need out-of-home skilled nursing care, where are they going to live?

The California conservatorship system, described as flawed in 2006, needs reform, and it is unlikely that things will change for the better, without funding to implement additional reforms and court oversights. Assemblyman Jones, in drafting AB 1363, understood the need for reform and change. When the governor vetoed conservatorship reform funding, Assemblyman Jones voiced disappointment. "This cut falls heavily on seniors and others who have been taken advantage of by conservators lacking sufficient court oversight. There will be seniors and others who will suffer financial and physical abuse as a result of this."

To pass legislation and not to fund it is not going to make things better in California and we are dreaming if we think it can.

"All the leaves are brown [All the money's gone]

And the sky is grey.

I've been for a walk

On a winter's day.

I'd be safe and warm

If I were in L.A. [Would I?]

California Dreamin'

On such a winter's day." 13



CAROL KARWATT

Carol Karwatt is a legal secretary at Corey, Luzaich, Pliska, De Ghetaldi & Nastari LLP in Millbrae, California. Carol serves as Governor of San Mateo County Legal Secretaries Association and chairs the Charitable and Special Project Committee. Carol is an assistant editor on Legal Secretary Incorporated's Publications Revision Committee.

San Mateo County Legal Secretaries Association Walks the Walk

BY CAROL KARWATT—SUBMITTED BY SAN MATEO COUNTY LSA

I was appointed by our Association President Shara Bajurin as Charitable and Special Events Committee Chair. This was a new committee for San Mateo County LSA. I had participated in several nonprofit fund raising events using their online "team" website which made it convenient to make online donations. I had previously been involved with the American Heart Association Heart Walks.

The Heart Walk was scheduled to occur approximately four months from when I first contacted them. San Mateo County LSA entered the Heart Walk as a Team. We promoted the event with fliers and announcements at our general meetings and on our website. In preparation for the walk, it was my duty to ask members to join our Association's team of walkers. The Heart Walk would be the Association's First Annual American Heart Association Heart Walk.

We had 14 members and fundraisers for the Heart Association. They assigned us a goal of \$3,000. At the time \$3,000 seemed a little daunting to collect and especially with the economy, layoffs, etc.


To motivate our members, in August we had a representative of the local American Heart Association come to our meeting as our guest speaker for the evening. We had a great turnout especially for the month of August. Over 30 of our members attended. The Heart Association representative gave an informative and interactive PowerPoint presentation on the causes and prevention of heart disease. The presentation raised the fact that heart disease is the number one killer among women and how the symptoms of a woman having a heart attack may differ from that of a man.

Some of the signs for women are the same as with men and a woman's most common heart attack symptom is chest pain or discomfort. But, women are somewhat more likely than men to experience some of the other common symptoms, particularly shortness of breath, nausea/vomiting, and back or jaw pain.

September 20, 2009 was our big Heart Walk Day. We all arrived early to enjoy early morning wake up coffee and warm up exercises with the other participants. The Walk was held at Coyote Point County Park and was a 5K. It was a very scenic walk along the edge of the San Francisco Bay. The weather was unseasonably warm which made it very pleasant. It was a great day, seeing members of the Association at a non-meeting event, exercising together and participating together for such a worthy cause.

The best part was exceeding our goal of raising \$3,000! Ana Navarro, a member, raised \$700 and was awarded access to the VIP tent at the Walk. Our Association is extremely proud of her achievement. We were honored at the Heart Walk post walk celebration. We came in first Place for being the newest team to raise the most amount of money! We also received a trophy. We are already planning to participate in the Walk for 2010.

This was a great fundraiser. There were so many benefits for participating as I mentioned above. The Heart Association set up our website and it was easy to maintain for online donations. It is well worth the time.

For further information about your local American Heart Association, their website is: <http://www.americanheart.org> 

Attending My First Conference

BY MATTHEW C. TABARANGAO—SUBMITTED BY CAPITOL CITY LPA

I do not think it would right of me to write this article without first saying that, yes, I was one of those who had a small-minded view of what my little Capitol City Legal Professionals Association and those things asso-

ciated with it was all about. To be honest, with all of the use of acronyms, I got lost in the PLS, CCLPA, LSI and the CCLS'. In my head, they all kind of ran together. All I had ever seen is my little group of maybe 5, 10 or 15 ladies, in our local restaurants, having good laughs, some great speakers and moments of enlightening - then came the 2009 November Quarterly Conference.

loves, hates and obsessions that you did -- oh how wonderful a feeling!

Conference taught me about my field of work. Almost, as if through osmosis, I was gifted some of the best policies and procedures from

I feel it's my duty to learn from those more experienced than me...

Not only did I have the pleasure of simply being at conference, my association and I had the unique privilege to host it with the most gracious Placer County Legal Professionals Association. I was the registration boy (emphasis on boy please). I greeted, I passed out boodle (a word I quickly had to add to my vocabulary) bags, registration cards, I smiled until my cheeks hurt, and I did my best to make those in my most brilliant Capitol City feel right at home. To put it short, it was amazing. Every group of people have their own special meeting place where like-minded individuals get together to teach, dance, drink and laugh about the thing that brings them together. In our case (read: everyone in attendance), that was being a LEGAL PROFESSIONAL. Whether you are the receptionist at a law firm, the calendaring girl, a legal secretary, a runner and/or, but not limited to, a paralegal (add all of that fun PLS, CCLS if you want), you are welcomed with open arms by people that have the same

the BEST in their field. I too, was able to share a little about what I do with others as well. The constant exchange of information sent such a positive energy through the hotel, through me, and everyone else that literally, after a 13-hour day, I found myself supercharged and ready to go.

For young legal professionals out there, conference, LSI and the local associations are the perfect example of how wonderful the transference of experiences between the young and the young at heart is in its most basic form - conversation. I am known in the San Diego, Mt. Diablo, Sacramento and probably many more legal associations and I LOVE IT.

I'm making it my personal mission to add to the ranks of LSI. After conference I feel it's my duty to learn from those more experienced than me, and it has already been shown to me time and time again the intense duty felt by those more experienced than me to helped the less learned.

Conference has prepared me for the years ahead that I plan to spend in the legal field and for the experiences that I may or may not have. I am so grateful for everyone that I have met and all the laughs that were had, all of the education brought forth and all of the experience that I have gained.

To every secretary that reads this remember: WE ARE AMAZING!! **LS**



MATTHEW C. TABARANGAOS

Matthew C. Tabarangao a proud member of the CCLPA in Sacramento California where he has worked at Remy, Thomas, Moose and Manley for about 3 years. He's an avid techie, singer and socialite of the Downtown Sacramento region.



**CATHLEEN MCGRATH
SILER**

Cathleen McGrath Siler, President of Long Beach Legal Secretaries. Cathleen works for the law firm Atkinson, Andelson, Loya, Ruud & Romo in Cerritos, California. She has been a legal secretary since 1988.



ALICE M. WIDMARK

Alice M. Widmark, CCLS, Vice President of Long Beach Legal Secretaries Association. Alice is a freelance legal secretary. Alice has worked in the legal field since 1959.



DEBBYTANKERSLEY

Debby Tankersley, CCLS, 2009 Annual Conference Chair. Debby works for Jackson, DeMarco, Tidus, Peckenpauigh in Irvine, California. Debby has worked in the legal arena since 1979.

Long Beach Legal Secretaries Association 80 Years of Service to the Legal Community and Beyond

BY CATHLEEN MCGRATH SILER, ALICE M. WIDMARK, CCLS, AND DEBBYTANKERSLEY

—SUBMITTED BY LONG BEACH LSA

In September 1929, the first Long Beach Legal Secretaries Association meeting was held. In 1929, Eula Mae Jett, a Long Beach legal secretary, was given a last-minute filing to be completed immediately - not a rarity in this field even today! When she gave the papers to the clerk, he advised her that the forms she used were obsolete and she was required to use the updated forms. She told him that she did not know about the new forms. She asked the clerk if she could just file the forms she brought with her that were already completed and signed by her attorney. He said, "NO!" After a lot of begging, the clerk finally allowed Eula Mae to fill in the forms by longhand and sign them on behalf of her attorney after receiving permission from her employer. The clerk then made the remark that he "couldn't see why the girls employed in law offices couldn't learn what was required in the preparation and filing of legal documents." Upon her return to the office she talked with her employer, the late Ben W. McLendon, and asked him what he thought about the legal secretaries getting together and he thought it a wonderful idea.

Eula Mae called "some of the girls" she knew and asked them to have lunch to brainstorm about this wonderful idea. The ladies then sent an "Order to Show Cause" to all law offices in Long Beach as to why all secretaries should not appear at a dinner to find out what it was all about. (An idea I am seriously thinking about using myself.) The cost for dinner was 50 cents. The meetings for the years following were held in one of the courtrooms at the Superior Court in Long Beach. At the first

meeting, approximately 40 secretaries joined as members and the rest is history - LSI History.

In 1965, Eula Mae wrote and presented a wonderful speech at one of the LSI conferences. It is amazing that the points she touched on in the speech back when I was only one year old, still stand true today. In reference to having speakers from all areas of law at the meetings and going over all new forms at the meetings when they come out in any area of law, she said, "You may not think it necessary to have so general a knowledge of all those things because your employer specialized in a particular field - but what if you had to look for a new job tomorrow, next week or next month?" "Your next job could be in an entirely different field of law." It is as if Eula Mae is standing in front of us today. Eula Mae went on to say, "Some of you think: 'This doesn't pertain to us - we are better educated today than they were then - times have changed.' Oh - No. We still have schools and we who are out of school are still learning. Have times changed???"

This has been an ongoing discussion from nearly the beginning of this association. "Why doesn't our membership increase? Why don't we have better attendance at our meetings?" And many more questions along this same line. Eula Mae suggested we ask ourselves these questions, "What do we give our members? What incentive do we offer? Why did they join the association? The association was founded for educational and social purposes. The sociability of the meetings is a wonderful thing and gives the members a lot of pleasure,

but let's not lose sight of the other purpose. Let's ask ourselves another question: What do our members expect when they pay their dues and what did we tell them the purpose of the association were when we asked them to join?"

There was an endless array of appetizers and a plentiful buffet leaving no one hungry which of course was followed with dessert. Lovely candle centerpieces provided by Debby Tankersley, CCLS, bottles of wine, strings of pearls and feather boas



I am proud to say that these are questions discussed at every conference. I was so inspired by the history of this association that I have made it one of my goals to keep it going and maintain the values and ideas that the association was founded on (as I have witnessed with all of the local associations).

This year LBLSA celebrated its 80th Birthday. The parties theme was "Let's Party Like it's 1929." Most came dressed in 20's attire and the decorations echoed that theme. Music was provided by *The Jett Setters*, organized for the occasion by Jack Widmark, husband of LBLSA Vice President, Alice M. Widmark, CCLS. Jack played clarinet and saxophones and was accompanied by piano, guitar, bass, and drums. Pianist, Nina Beck, sang several songs, as did Alice - in her first appearance before her 'hometown crowd' of legal support staffers.' The band was such a hit we asked for more and insisted that they play for another hour!

adorned our tables set with black table clothes and teal napkins.

Gracing us with her presence was LSI President, Christa Davis, who was accompanied by her husband, Fred. Also in attendance were representatives from associations around the state, including Mt. Diablo LPA, San Diego LSA, Los Angeles LSA, Ventura LSA, and San Gabriel LSA. Members from Children's Law Center as well as owner and staff from No Rush Charge Attorney Service occupied two full tables. It was such a delight to get together with our sister associations, let loose and just have fun.

Many of the ladies danced to New York New York and performed a memorable, to say the least, chorus line finish! While others kicked up their heels to other period tunes and enjoyed a little swing dancing. Margaret Tovar "cut a rug" with Christa's husband and had us all thoroughly entertained! **LS**



ANNIE PARRISH

Annie Parrish is vice president and programs chair for the San Diego Legal Secretaries Association. In addition, she is an assistant editor on LSI's Publications Revision Committee. She works as a legal secretary at Hooper, Lundy & Bookman, Inc., in their San Diego Office.

Annie has been married for 18 years to her wonderful husband, Buz, and has one great son, Ricky, who is attending school on the East Coast and will graduate in December.

San Diego Legal Secretaries Association Inter-Association Wine Tasting and Tour at Callaway Vineyard and Winery

BY ANNIE PARRISH, CCLS—SUBMITTED BY SAN DIEGO LSA

For when the wine is in, the wit is out.

—THOMAS BECON (1512-1567) CATECHISM, 375

On September 19, 2009, 22 members from San Diego Legal Secretaries Association, Imperial County Legal Professionals Association, Long Beach Legal Secretaries Association, Orange County Legal Secretaries Association, and Los Angeles Legal Secretaries Association gathered at Callaway Vineyard and Winery in Temecula (despite the oppressive 100 degree heat), for a private wine tour,

and wine and truffle tasting. We gathered in the gift shop and once everyone arrived our tour began. Our winery guide explained to us at length about the Callaway Vineyard and Winery's history and the process by which their grapes are grown. We learned that Callaway Vineyard was first planted in 1969 and since the early 1970s, the vineyard has proven wrong the wine experts who considered





Southern California an unsuitable climate for growing grapes. Now celebrating its 40th year, Callaway has called attention to Temecula as a credible region for producing quality wines.

This vineyard produces only "boutique" wines (also called "special selection" wines), as opposed to "commercial grade" wines (commonly found in grocery stores). Callaway Vineyard & Winery wines are only available at the winery and are not available in any retail stores and we were about to taste the fruits of their labor! But first our guide led us on a private tour of the winery, including the crush pad, where the raw grapes are processed and the skins removed, and the barrel room, where the wine is stored for aging (and where it was cool and shady enough to provide us some respite from the heat).

Following the tour, we met in a private tasting room, where tables were set with Callaway wine glasses and a selection of gourmet truffles at each place setting for pairing with the wines. We tasted four wine and truffle pairings: a 2008 Sauvignon Blanc paired with citrus lavender honey truffle; a 2008 Char-

donnay paired with ginger praline truffle; a 2005 Merlot paired with salted caramel truffle; and a 2005 Cabernet paired with Origin Peru truffle (the chocolate actually comes from Peru). All the wines and truffles were very tasty and we had fun discussing which ones we liked best. When the tasting was concluded, there did not appear to be any leftovers on the tables! Many of us then spent some time in the gift shop choosing wines to take home or gifts for friends and family.

After the event's private tasting, the San Diego girls were not quite ready to call it a day, so we gathered at Callaway's busy tasting bar where we each bought another six tastings. A wall of windows behind the bar overlooked the rolling hills of the vineyard and the view was spectacular. Well, after six more wine tastings, everything was looking spectacular!

But seriously, the vineyard and the view were really beautiful, the company was very enjoyable, and the inter-association trip made for a very pleasant way to spend a Saturday afternoon.

LS

Difficult or Different The Intergenerational Workplace

BY CHERI JACOBS—SUBMITTED BY MERCED COUNTY LPA

CHERI JACOBS

Cheri Jacobs is a paralegal in the Probate/Estate Planning Department of Berliner Cohen. She has experience in probate, trust administration, estate planning, corporate, and civil litigation. She holds an Associate of Arts degree from Merced College, in Merced, California, and was promoted to a paralegal through her experience in the legal field. She is also a member of the Merced County Legal Professionals Association.

What happened to "yes sir" and "yes ma'am?" When did "right away" change from an immediate action to eventually? The fact is times are changing and as the years progress, new generations of working class citizens are joining the workforce with new attitudes. Can this mix of generations cause difficult problems in the office or will the combination of generations bring better productivity?

Think about it, we are living in a day and time where there is so much diversity in the workplace; and it is not just an issue of race, ethnicity or gender. We are dealing with 'Radio Agers,' also known as 'Veterans' (born before 1946), 'Baby Boomers' (1947-1964), 'Generation X'ers (1965-1976), and our largest group, 'Generation Y'ers,' also known as the 'Millennials' (born after 1977). Four distinct generations working side by side. The moral principles or values of each of these groups shape their world views, their attitudes, communication styles, and ease of technology. Their choice of ethical priority is what makes each generation, and each individual, unique; but it can also pose a challenge with the intergenerational harmony in the workplace.

In order to get along, we may need to learn to see through the eyes of another generation so we can try to understand where they are coming from. What factors influenced their mind set. In doing so, we may be able to gain some insight on the values and needs of others.

Take the Veterans for instance, they bring a traditional, heroic attitude to work, having lived through the Great Depression, Pearl Harbor and the Atomic Bomb. They are practical, respectful and accustomed to hierarchical leadership. Then came the Baby Boomers, they championed basic freedoms hard won in the Civil Rights Movement, the Space Race and Vietnam War. They are typically driven

and optimistic - cautiously pro-technology and interested in helping younger generations learn. Generation X'ers, our computer babies, raised during the Clinton Administration, Challenger Disaster, and Roe v Wade. They grew up self-reliant and not nearly as trusting as the Boomers. The media exposed them to so much more. Lastly are the Millennials. The World Trade Center and Pentagon attack marks their world, along with the death of Princess Diana and Mother Theresa. The escalation of technology has turned this generation into a self-absorbed, immediate gratification population. They are smart and sophisticated. Their 'DNA' consists of DVDs, iPods, wireless access, multiple cell phone families, and the internet.

The priority values of each of these groups shaped their world view. An online focus group conducted by Gensler in 2005 quoted "With multiple generations you get the benefits of an older, more experienced generation as well as the youth's knowledge of the current technology and trends. In a way, they complement each other." (*Strategies for the Intergenerational Workplace* by Kate Kirkpatrick, Steve Martin, Sandi Warneke.) Every generation brings its own strengths to the office, and if blended together correctly, they can be a powerful team for the company.

Ethical challenges between intergenerations in the workplace should be expected. The challenge for each of us then is to try to differentiate between whether it is a personality and productivity related conflict or simply a difference in background and work style. Once we understand the generations' different expectations in the workplace, we can begin to create an intergenerationally friendly environment in which to work. **LS**

"That which seems the height of absurdity in one generation often becomes the height of wisdom in another."

—Adlai Stevenson

Dates to Remember in 2010

February 26-28, 2010

LSI Third Quarterly Conference

Hosted by San Diego LSA
Doubletree Hotel San Diego, Mission Valley

March 1, 2010

Deadline for submission

of articles for May issue of The Legal Secretary

March 20, 2010

CCLS Examination

Northern and Southern
California locations

April 19, 2010

Last day to reserve a room

for Annual Conference and receive group rate

April 20, 2010

Last day to register

for Annual Conference to avoid a late fee

May 20-23, 2010

LSI 75th Annual Conference

Hosted by Butte County LPA and Sacramento LSA
Hilton Sacramento Arden West

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 Photocopiers and Process Servers

www.capps.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.aalinet.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>



DEBORAH RICKERT

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

A Message From the Editor

BY DEBORAH RICKERT, CCLS

As we begin the final months in our fiscal year, the articles are coming in fast and furious. Many teams are earning points for their submissions. Thanks to all associations who sent in articles. Because of the volume of articles received, there are several being held for printing in the next issue. If you submitted an article and it is not included in this issue, you should have received an email with information on the status of the submission. Please let me know if you are unsure about any articles which were sent.

The entire LSI team is moving forward with new ideas, fresh knowledge and I'm pleased to say, there has been a change in the contest standings. At this time, Merced County LPA is still in the lead with San Diego LSA in second place. There is a tie for third place with Rio Hondo LPA and San Mateo County LSA. The deadline is fast approaching for articles to be submitted to help move your association into the Annual Conference 2010 winners circle. The teams scheduled to submit for the May issue are: Santa Barbara, Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County and Ventura County.

Articles are to be received no later than March 1, 2010. In addition to the article, please submit a digital photo of the author, short bio and completed checklist. All articles can be sent via email. Additional hard copies and copy on disk which were previously being sent via U.S. mail are no longer required. Remember, any team (association) can submit articles anytime during the year. Would you like the honor of being announced the winning Asso-

ciation? It's easy; submit all articles before the deadline of March 1, 2010.

As you can see, The Legal Secretary magazine has a new lithographer and designer. Perry Bleecker, our new designer, made changes to update and create a more professional publication, and Modern Litho printed and mailed this issue, which I hope is pleasing to you all.

Let us know what you like and how you feel about the new look of the magazine. Your comments and suggestions are always welcome. **LS**

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CCLS MOCK EXAM
(Revised for 2009)

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

*Item available to LSI members only.

(Prices effective 5/1/09)

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

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*Item available to LSI members only.

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A Program of
Legal Secretaries, Incorporated



APPLICATION

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

**CCLS Certifying Board
5726 Lorelei Avenue
Lakewood, CA 90712**

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, March 20, 2010
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 16, 2010

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

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

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

* Fees subject to change without notice.

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

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

Name _____ Last 4 Digits of SSN _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____

E-mail(s): _____

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

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

Dates _____ Position _____

Employer _____

Address _____

City/State/Zip _____

Supervisor _____ Phone _____

Summary of Duties _____

Dates _____ Position _____

Employer _____

Address _____

City/State/Zip _____

Supervisor _____ Phone _____

Summary of Duties _____

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

Signature of
Applicant _____ Date _____

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NOTE: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members to find the BEST coverage for each member's individual needs and location. For information call these representatives directly.

DISCOUNT THROUGH CEB

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

STEVEN C. DANNENBERG, AFLAC Agent
11091 Rhyolite Drive, Suite 4
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Work - (530) 877-6332 -- Fax (530) 877-7054
paralegalbam@sbcglobal.net

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ELECTED OFFICERS

President

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

Vice President

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

Executive Secretary

SANDRA T. JIMENEZ, CCLS
Cell: (760) 604-3057; Office: (760) 352-5421
Fax: (760) 352-5422
E-mail: sjimenez52@yahoo.com

Treasurer

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

APPOINTED OFFICERS

Executive Advisor (CEC)

LORRAINE BETTENCOURT, PLS, CCLS
Home: (209) 356-0815; Office: (209) 383-0720
Fax: (209) 686-3083
E-mail: plscccls@aol.com

Parliamentarian (CEC)

KAY J. BLISS, CCLS
Home: (951) 689-3306
E-mail: kayjbliss@sbcglobal.net

Editor-in-Chief (CEC)

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

Editor, The Legal Secretary

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

Educational Program Coordinator (CEC)

JENNIFER L. PAGE
Home: (415) 898-1010; Office: (415) 721-2040
E-mail: jlpagel@ix.netcom.com

Historian

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

Legal Specialization Sections Coordinator (CEC)

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

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E-mail: smendez@altber.com; mendez.sally@gmail.com

Editor, LSI Legal Professional's Handbook

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

Editor, Law Office Procedures Manual

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

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

LEGAL SPECIALIZATION SECTIONS

Coordinator

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

Civil Litigation

ELIZABETH ADAME, CCLS
Home: (760) 353-8333; Office: (760) 352-4001
Fax: (760) 352-5561
E-mail: liz.adame@sbcglobal.net

Criminal Law

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

Family Law

STEPHANIE HARRISON
Home: (209) 723-4479; Office: (209) 384-0123
Fax: (209) 384-1661
E-mail: stephmjb@sbcglobal.net

Law Office Administration

JAN VORNKAHL, CCLS
Home: (510) 790-8337; Office: (415) 984-8341
Fax: (415) 226-0735
E-mail: jnstitches@sbcglobal.net

Probate/Estate Planning

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Office: (707) 442-0500
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Transactional Law

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PUBLICATIONS REVISION COMMITTEE

Editor-in-Chief

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

Editor, LSI Legal Professional's Handbook

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

Editor, Law Office Procedures Manual

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

Assistant Editor

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

Assistant Editor

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

Assistant Editor

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

Assistant Editor

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

Assistant Editor

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

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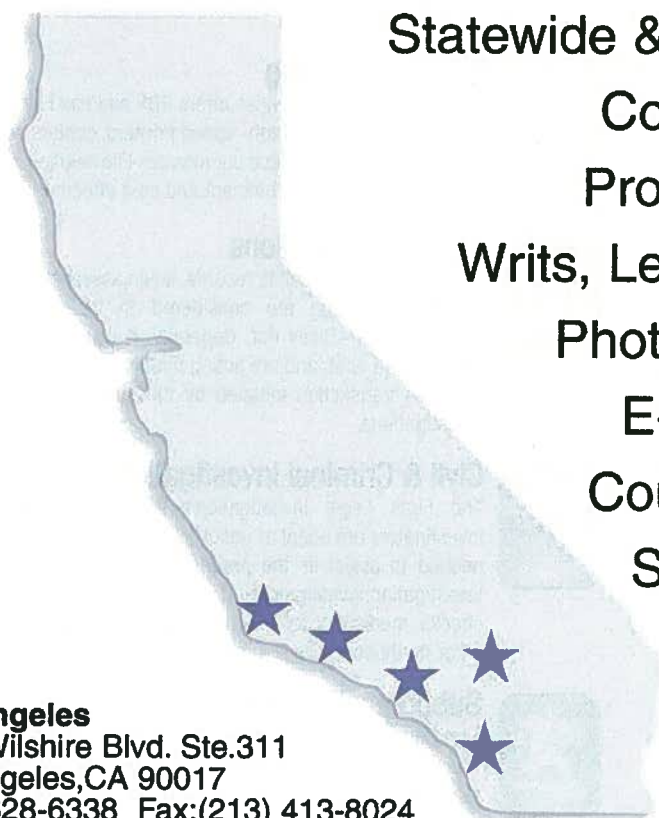


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