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Welcome to the "Roaring Twenties" in Butte County

BY JUDITH WILLIAMS

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

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President's Message

BY JENNIFER L. PAGE, CCLS, LSI PRESIDENT



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

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

Jennifer obtained her CCLS designation in October 2008.

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

We all know the usual benefits of being a member of LSI. However, I have recently discovered two added benefits to being a member of this organization. Which makes me laugh just a little as I have been a member since 1991 and would have thought by now that I would know all of the benefits available to me. But then, I realized that the benefits of being a member of this organization is ever-evolving, and in reality I have probably learned added benefits to being a member since 1991; I just never really acknowledged them. The added benefits I have discovered are inspiration and enthusiasm.

At our recent conference held in Palm Springs, California, the Executive Committee made several Bylaw Amendment recommendations. After much discussion, one was approved and two others were not. What I came away from this process was that the members and Governors are engaged in the process of shaping and molding LSI for the future. Not long ago, amendment recommendations would be made and when asked if there was any discussion, silence fell upon the room. This was always a bit disheartening. However, at the November Conference, there was lively discussion and this has provided me with added enthusiasm and inspiration to keep moving forward and to find new ways to entice people to join LSI. And in hindsight, I always return home from conference inspired and enthused about the career path I chose and the decision I made to join LSI in 1990 and to participate on the state level.

I respect the history of LSI and the founders of this great organization. I also have tremendous respect for every officer, chairmen and past president who has served. However, we need to look for new ways to encourage the legal community to join our organization. Maybe it's adding a Student Membership category to LSI that would encourage those taking paralegal and beginning legal secretary courses to become members once they are done being a student. Not every local association has access to student members. I know in Marin County the only access to classes to become a paralegal or learn more about being a legal secretary are via online classes. We need to continue to offer online classes and I believe that is part of where our future is headed. So we need to continue to find exceptional speakers to address topics of interest for our members.

While we finished the last quarter with more members at this time than last year, we need to continue to reach out to our local legal community and encourage paralegals, legal secretaries, file clerks, and even attorneys to join our organization. Each and every member is the best ambassador for LSI and I encourage each and every one of you to go out into your legal community, share your reasons for joining and the benefits you personally receive and recruit members to join.

If you didn't attend the November 2016 Quarterly Conference – well, you missed out – again! Desert Palm LPA did a tremendous job putting on the “Pink Party.” Beginning with the hotel, I have to say that the Palm Springs Hilton is one of my favorite places to go. Friday evening started with the CEC workshop and then we were greeted and entertained during the Welcome Reception Friday evening and then off to LSS workshops. Saturday was another busy day with the CCLS Workshop bright and early, the Board of Governors Meeting, luncheons, LSS workshops, and then Banquet. Which I believe we had another first; dancing before, during and after banquet. Another highlight was being

able to speak with and hear from Sheila Williams. I think everyone who attended banquet would agree that Ms. Williams is truly an inspirational and powerful speaker. We finished conference with our Sunday morning brunch and were treated to another wonderful speaker, Kimberly Lee, a local attorney who spoke about how her life shaped who she is today and reminded us that even with 'wet pants on' we can conquer anything.

I will continue to encourage each and every one of you who has not yet attended a conference to do so. You really are missing out on an amazing and inspiring weekend that will fill you with enthusiasm as you return home to your families, friends and your job. So, go to the "Upcoming Conferences" section of the LSI website, you'll see that the schedule for conferences goes through August 2018. We have conferences being held all over the State of California, find one near you and make plans to attend. Or hop on a plane and travel to an area you've never visited. I guarantee you won't regret it.

By the time you receive this edition of the magazine, the holidays will be behind us and a new year will have begun. Which means February 2017 Quarterly Conference is right around the corner. We're headed to Chico, California and our gracious hosts will be Southern Butte County LPA where the theme is the "Roaring 20s." I again encourage you to attend. I encourage you to participate. I encourage you to dress up for Banquet, attend classes, use your voice at the Board of Governors meeting. As always, we will have a CEC workshop Friday evening, LSS workshops Friday and Saturday and a CCLS workshop on Saturday morning. Fliers for these classes appear in this issue and are also on the LSI website.

For now, I wish you all happiness, joy, good health and much success in everything you do.

LS



LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM

"California Legal Procedure Part 2"

Third Quarterly Conference, February 24-26, 2017
Ramada Plaza, Chico

Saturday, February 25, 2017, 7:30-8:30 a.m.

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

The California Legal Procedure section of the CCLS exam covers five areas of law – Civil, Probate, Family, Corporate, and Real Estate. We covered Civil in Part 1 of this workshop. In this workshop we will cover the remaining sections, including an overview and things to look for while studying.

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Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, San Diego, CA 92101, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



SUSIE FAGALDE is a probate/estate planning secretary with Berliner Cohen, LLP in their Merced, California branch. She is currently LSI's Probate/Estate Planning Legal Specialization Section Leader. She is currently the Merced County LPA President and previously served as MCLPA's Secretary from 2014-2016. In her spare time, Susie is an active member of her community by serving on charitable boards and recently became a certified foster/adoptive parent and is awaiting her first placement.

Bridging the Gap Between Then and Now

BY SUSIE FAGALDE - SUBMITTED BY MERCED COUNTY LPA

At the November conference I stood up at the Board of Governors meeting and addressed the Executive Committee and the general assembly regarding the overall feeling of exclusivity given off by the recent proposed bylaw amendment. As one of the younger members of LSI, I wanted to expand on my comments from November.

I find value in this organization, in the education I receive and in the networking opportunities through meeting members of other associations. I also find value in creating new friendships with members of other associations. This is an organization I would like to continue being a part of and that I would like to see be successful well into the future.

LSI has a long history. I would never discount that history. We really don't need to look any further than our Articles of Incorporation to see that this organization was intended to foster a community that promoted new ideas and brought diverse people together. However, I feel there is an air of exclusion that is threatening to take over this organization. I feel that we are in danger of losing sight of our true purpose, which is bringing together legal staff from throughout the state and as our own motto says, providing "Excellence Through Education." The attitude of "this is how we've always done it" will not lead to growth of this organization. That sort of thinking just does not resonate with those my age. If we want to grow, we'll need to find a way to innovate. I was raised to think that new ideas were a good thing and even if it didn't work out – hey at least we tried something different. I understand that this is a corporation that has business to conduct, but maybe it's time to look at new ways of conducting that business, streamlining our processes to maximize efficiency and allow for more time to get back to our original purpose of growing our association and educating our members.

Growing an association isn't easy. Gaining new membership with people in their 20s and 30s can be tough. We have busy lives with young families and a lot of commitments outside the four walls of our offices. Joining

an association with a very established membership can be very intimidating too. I remember attending my first conference and not seeing anyone in my age category that I could connect with. I have been fortunate enough to meet some very nice people that I would now consider friends – but had I not made those connections, it would make for very long weekends every four months. To start off I wasn't sure where I fit in. I had only been a legal secretary a few years, just a drop in the bucket compared to the vast years of experience some of the members in LSI have – how could I possibly have anything in common with these people? I realize now that LSI is comprised of many wonderful people that are full of knowledge and are not so intimidating once you get to know them. I might still be one of the youngest people in the room, but at least I see some friendly faces when I look around now.

I am trying to grow my career and hopefully grow a family. I try to be an active part of my local community. There are only so many discretionary free hours I have – and four times a year I give several of them to LSI, not including the time spent as President of my local association or in preparation for the quarterly and annual conferences as a Legal Specialization Section Leader. I say all of this not because I think I have all of the answers, but because I want everyone to understand that it is important to not only get the younger generation to join, but to want to stay a member. We need to be welcoming of these younger people. I promise we are not going to come in and shake everything up until it's unrecognizable. We will, however, bridge the gap between the "Then" and the "Now" and bring LSI firmly into the 21st Century.





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**The 2016 November LSI Quarterly Conference themed
“The Pink Party” was hosted by Desert Palm LPA.**

Congratulations on a successful event!





APRIL IGNAITIS, CCLS has worked in the civil litigation field for over 25 years. She received her designation as a CCLS in April of 2015. She graduated from DeAnza College, with a Paralegal degree (cum laude) in Paralegal studies and is currently employed in the San Jose office of Littler Mendelson, P.C., the nation's largest employment and labor law firm. She joined Santa Clara County LPA in 2007 and currently serves as Santa Clara County LPA's Treasurer and Ways & Means Chair. She is also serves on the CCLS Certifying Board.

What Being a CCLS Has Done For Me

BY APRIL IGNAITIS, CCLS, CCLS CERTIFYING BOARD MEMBER

Since becoming a CCLS in March 2015, it has impacted my personal life and professional career in many ways. I became the first CCLS in my office. At first, I didn't know what a CCLS was until I became more involved in Santa Clara County LPA (SCCoLPA) and attended my first annual conference. At the annual conference, I attended a CCLS luncheon honoring and recognizing those that recently passed the 8 hour, all-day exam. I heard the stories and struggles of each of them, and it was at that moment that a light turned on. I made a goal that the following year at this time, this is where I wanted to be. I took the plunge and signed up to take (and pass) the March exam. I convinced my office manager to purchase the Law Offices Procedures Manual for our office, and explained/educated her and others on what a CCLS was. I support three heavy civil litigators and they were all very supportive of my endeavor. I studied hard, and at times, had my doubts and fear of failure and asked myself what I got myself into. I was then reminded that no one said it would be easy, because if it was, then everyone would be doing it.



But through prayer, faith and support from family and friends at SCCoLPA, I made it through. The journey was tough, but it taught me that no goal, no dream is out of reach, no matter how far out there it may seem. It also taught me to have faith in the One that always has my back. The trials and storms of this journey we call life makes us stronger and gives us confidence to dream even bigger. Since becoming a CCLS, I have received recognition at my job, and confidence in my abilities. It has also impacted my personal life by giving me confidence to explore and try new things. I have since become more involved with SCCoLPA by becoming Treasurer and the Ways & Means Chair. I became a new member of the CCLS Certifying Board at the state level as well, and who knows, maybe...

So, if you are on the fence, I urge you to take the plunge and try. Life is short, but the journey is exciting.

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MARILOU F. MIRKOVICH, ESQ. is a partner in the Cerritos office of Atkinson, Andelson, Loya, Ruud & Romo. She conducts, supervises, and evaluates investigations focusing on discrimination, harassment, whistleblower allegations, and Title IX sexual misconduct. Ms. Mirkovich can be reached at Mmirkovich@aalrr.com

Understanding Transgender Protections in Public Schools

BY MARILOU F. MIRKOVICH, ESQ. - SUBMITTED BY LONG BEACH LPA

Recent Attention Concerning Transgender Protections in Public Schools

Transgender protections in public schools have been in the forefront of recent national media coverage. The recent debate over transgender protections began over a North Carolina law that required people to use public bathrooms that correspond with the sex on their birth certificate. The United States Justice Department sued North Carolina over that law.

Shortly after the Justice Department sued North Carolina, the Department of Education and the Department of Justice jointly issued a significant guidance letter - a "Dear Colleague Letter" - explaining schools' obligations under Title IX vis-à-vis transgender students. (Title IX is the federal act prohibiting sex discrimination in schools that receive federal funding.) In the May 2016 Dear Colleague Letter, the departments stated that under Title IX a student's gender identity is treated as the student's sex, which, in turn, meant that transgender students must be permitted to access bathrooms, locker rooms, and other sex specific activities according to their gender identity, even if their biological sex is different. Although the guidance did not expressly state that schools will lose their public funding if they did not comply with the guidance, in court documents the Obama administration stated that schools receiving public funds are "clearly on notice" that such anti-discrimination policies must be followed suggesting that withdrawal of public funds is at risk for non-compliance.

States Respond with Litigation

On May 25, 2016, days after the issuance of the May 2016 Dear Colleague Letter, 11 states sued the federal government over that Dear Colleague Letter. That lawsuit has two key components: (1) that the Dear Colleague Letter exceeds the scope of Title IX; and (2) that an



interpretation of Title IX requiring students to access bathrooms and locker rooms based on the gender identity and not sex violates the constitutional privacy rights of non-transgender students using those facilities. On August 12, 2016, arguments were heard on the states' request for a preliminary injunction, and on August 21, that court granted the states' motion for a preliminary injunction blocking the federal government's enforcement of the May 2016 Dear Colleague Letter. The federal government will likely appeal that ruling.

It is also important to note that on August 3, 2016, in response to an emergency appeal from a Virginia school district, the Supreme Court blocked a court order allowing a transgender boy to use the boys' bathroom—which preserves the status quo while the school district proceeds with a petition for review to the Supreme Court. In short, all signals point to the Supreme Court granting review of the decision.

California's Protections for Transgender Students

On the other hand, in California, protection for transgender students is not new. On January 1, 2014, California Assembly Bill 1266 became effective. That law requires students be permitted to participate in sex-segregated school programs, activities, and facilities

UNDERSTANDING TRANSGENDER PROTECTIONS IN PUBLIC SCHOOLS

consistent with their gender identity regardless of the sex listed on their student records. In response to AB 1266, the California Department of Education issued a “Frequently Asked Questions” concerning AB 1266. Those FAQs can be found at <http://www.cde.ca.gov/re/di/eo/faqs.asp>. The California School Boards Association also issued a guidance on AB 1266, which included the following advice for districts:

- Upon request, districts should allow any student wanting privacy to use an alternate facility (e.g. restroom, locker room) not used or occupied by other students.
- Upon request, districts should allow a student to use the gender-specific facility consistent with his or her gender identity.
- Upon request, districts should ensure that staff uses the name and pronoun preferred by a transgender or gender non-conforming student.
- Upon request, districts should prepare data systems to list a transgender or gender non-conforming student by his or her preferred name and gender.
- Upon request, districts should allow students to participate in athletics according to their gender identity in a manner that is consistent with the CIF bylaws.

The protections afforded by AB 1266 are not without controversy. Privacy for All Students, opponents of AB 1226 attempted to place a referendum on the ballot to overturn AB 1266, but that effort failed for lack of

valid signatures. Privacy for All Students, however, challenged that determination in a lawsuit. In May 2016, a Sacramento Superior Court Judge granted a motion to compel in that matter requiring local election officials to release the signatures for the referendum (which provides encouragement for those who oppose AB 1266).

Similarly, in the Clovis Unified School District, parents, who formed an organization titled “Stop the Madness,” renewed requests for the district to provide alternative physical education courses and bathrooms for students who have concerns about sharing a bathroom or locker room with a student who identifies with a gender other than their biological sex.

Nevertheless, it was recently reported that the San Bernardino County grand jury recommended that the county public schools convert their existing same-sex bathrooms into unisex ones and that the recommendation was in response to an “increasing number of lawsuits, national in scope.”

Conclusion

The current litigation in federal court has created uncertainty regarding federal protections for transgender and gender non-conforming students. Despite opposition, no such uncertainty exists under California law. In short, current California law provides express legal protection for its transgender and gender non-conforming students.

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TASHANIA MORRIS, MSHRM, ALS, CDF, CPC, started her career as a paralegal. She has over six years' experience in the legal field specializing in the areas of foreclosure and bankruptcy. She recently completed her Master's degree in Human Resource Management which has equipped her with the tools needed to think strategically and develop creative solutions to problems in the workplace. As a Certified Professional Coach and Career Development Facilitator she loves all things career and personal development. She is able to recognize people's skills and abilities and enjoys working with individuals to figure out their "why." Her mission is to engage, empower, educate and promote change from within. You can reach Tashania at Tashania_m@hotmail.com.

Benefits of Joining a Professional Organization

BY TASHANIA MORRIS, MSHRM, ALS, CDF, CPC

- SUBMITTED BY SANTA BARBARA LPA

Joining a professional organization like Legal Secretaries, Inc. ("LSI") is extremely important to your career if your main goal is to learn, grow, and network with other like-minded individuals. It exposes you to things you might not have been aware of and keeps you informed about current trends within the marketplace. I have heard many complain about not getting much from the professional organizations they join. Sometimes you get what you put in. If you want value from

an organization, you have to engage and become fully present. Over the years I have joined many organizations and have gained valuable skills that I might not have been able to gain otherwise.

Here are a few benefits you will get from becoming a member of an organization:

Information and Research

If you are just starting out, the information you receive will be invaluable. Some organizations, including LSI, provide monthly and/or quarterly magazines to their members which provide relevant industry information. There are surveys being conducted for research purposes, which are easily accessible for the members at no cost. This information might become valuable when working on research papers or for on-the-job use.

Professional Development and Conferences

Joining professional organizations gives you discounted and/or free professional development webinars and workshops that are likely included in your membership. These workshops are often taught by individuals with industry knowledge and can save you money. It is a way to get on-demand education as well. If you need to brush up on a skill or learn something quickly, this is a great way to do it. All you have to do is log on to the organization's

website and you will have an abundance of information at your fingertips. Conferences are a great way to network and meet people. It is a chance to learn from those within your industry and get the chance to meet with the decision makers as well. Some organizations offer certification which is extremely important because more employers are looking for experts within the field. While you might not get paid more for having gained a certification, it sometimes separates you from your competitors and will prove that you have expertise in your area of work.

Mentoring

I recently joined an organization and that was one of the best decisions I have ever made. Not only did it provide me with valuable information, it allowed me to find a mentor and a friend. Sometimes people think that mentoring is a one-way street; however, you can learn from each other because you each come into the mentor/mentee relationship with a different skillset that might be lacking in the other. Having a mentor provides you with



BENEFITS OF JOINING A PROFESSIONAL ORGANIZATION

a navigation system to help answer your questions. A mentor's job is not to figure out your career for you or find you a job, it is simply to help guide and inform you about what you might encounter along the way.

Networking

There has been so much written about networking, but let's be honest. For some of us, this is not an easy task. If you are an introvert and enjoy quiet days at home, joining a professional organization is one of the best things you can do. It will give you the support system you need because most of the people you meet will be able to introduce you to others so you will not feel alone.

Scholarship

The cost of education is becoming more expensive yearly, and a scholarship is a great option for many students who are reluctant to take out student loans. Scholarships help many obtain a degree they might not otherwise have been able to obtain. Many organizations provide scholarships for their members which exceed the price of their yearly dues and thus provide a huge return on the investment.

Employment

Many organizations provide their members with job opportunities and leads. Sometimes individuals become aware of jobs from networking and getting to know each other. Word of mouth and personal references are great ways to find out about employment opportunities because you get firsthand knowledge about the working environment and can easily get answers to your questions. It is always important to not only join an organization but to become an active participant. It is one of the best things you can do for your career and professional development.

Listed below are a few organizations that cater to legal secretaries and their needs.

Legal Secretaries Incorporated is a great organization for individuals currently living in California. They provide quality programs and educational opportunities to both legal secretaries and law office support individuals. The events include lunch and dinner meetings, workshops and conferences aimed at providing legal secretaries with the best resources available. Currently there are six specialization sections that members can choose to join, they are: Civil Litigation, Criminal/Family Law, Federal Law, Law Office Administration, Probate/Estate Planning, and Transactional Law. Section members can attend free workshops on a quarterly basis. They also promote a

California Certified Legal Secretary certification to enhance the career of legal support professionals. Certification is achieved by passing a comprehensive examination. They even provide scholarships for high school seniors, college students and career changers. Providing scholarships for career changers is a great idea because sometimes people are looking to change careers and are not able to do so because of lack of finances. Individuals are also encouraged to take the Beginning Legal Secretarial Training Class online for a small cost of \$150 for members and \$200 for nonmembers. Individuals can also join their local chapters such as the Santa Barbara Legal Professionals Association. Joining a local chapter is a great way to meet people, especially for those just starting out in the industry.

NALS the Association for Legal Professionals is a staple in the legal industry; its mission is to engage, inspire, enhance and promote. They provide industry legal certifications and specialty certificates as a way of advancing its members' careers. Individuals who opt for certification can do so by taking one of three tests: Accredited Legal Professional, Professional Legal Secretary and the Professional Paralegal. They also provide live webinars, a legal training course, and an on demand library where members can access past webinars, magazines, conferences and even volunteer for amazing opportunities. There is a wealth of information. They also have forums that members can connect on, share information and ask questions.

Organizations

- Legal Secretaries Inc.:
<http://www.lsi.org/>
- Santa Barbara Legal Professionals Association:
<http://www.sblegalnet.com/Index.html>
- NALS...the association for legal professionals:
<http://www.nals.org/>
- NALA – National Association of Legal Assistants:
<http://www.nala.org/>
- NFPA- National Federation of Paralegal Associations:
<http://www.paralegals.org/>
- ALA- Association of Legal Administrators:
<http://www.alanet.org/>

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KIM PARKE, CCLS, is a litigation secretary with Sheppard Mullin in the Labor and Employment department in the San Diego office. Kim has been a legal secretary for over 20 years. She began her career in Illinois before moving to California in 1994. She passed the California Certified Legal Secretary examination in 1999. Kim enjoys spending time hiking, camping and off-roading. In September 2016 she achieved her goal of climbing Mt. Whitney.

The Pitfalls of Being a Martyr

BY KIM PARKE, CCLS - SUBMITTED BY RIVERSIDE LPA

I am sure you have heard the word “martyr” before but have you ever actually taken a moment to think about what it really means? The Merriam-Webster Dictionary defines a martyr as:

A person who pretends to suffer or who exaggerates suffering in order to get praise or sympathy.

Based on the definition, I can say that probably all of us at one time or another could have been labeled a martyr. But what is continuing to be a martyr doing to your local association? Are you the person that always thinks you will do it yourself because no one else can get it done right or as quickly as you? Let’s take a look at what type of damage can be caused by continuing on that path.

A new member named Erin joins your association. Erin is all excited about the upcoming meetings and conference. She learns that you have a meeting coming up that she could be a great asset to. So Erin joins the association, attends the monthly meetings and volunteers to attend the planning meetings. “What can I do to help?” she asks. The board tells her nothing now as we are still in the planning stages. Erin attends the next meeting and again asks what she can do to help. This time the board assigns her a menial task to attend to. After all the board does not really know this person and whether or not she is reliable. Erin handles the task and then reports back her results.

Now the back and forth begins:

Erin: “These are my suggestions.”

Board Member: “Well maybe we will go with that.

Let’s wait and see.”

So Erin, who started off being extremely excited is now frustrated. She attends another meeting where she again offers her assistance, only to have the same board members say they will handle everything. She feels that they have been wasting her time. She wonders, “Why in the world did I volunteer in the first place?”

Let’s evaluate what just happened:

- The association lost a volunteer;
- The association failed to mentor someone new;
- The association missed the opportunity to train some-

one for a position on the board or as a chairman in the association; and

- The association may have lost a potential new member.

With these pitfalls, the same people end up doing the same job over and over again. How many times have you heard the statement, “Well, I guess I have to do it because no one else will.” Maybe the truth is the position you have in your local/state level association is a tough one to fill. But are you the only person that can handle the job? Are you truly the best person to keep handling that position? Or is resentment sneaking up on you and causing you to lose focus on the job at hand?

Do not let yourself fall into this scenario. Do not let yourself become a martyr. We all have heavier workloads, less time in the day and more nightly and weekend obligations. This is all the more reason to get people involved, to help with the workload and to continue to make your association a success. A good friend once told me to always set myself up for success. This can require planning, hard work and determination. By planning and putting in the hard work, the road that was started by a martyr can change as you travel on your way to success. The feeling of rejection, disappointment and frustration changes to challenge and excitement, and eventually leads to opportunities, achievement and success.

Do you see how making a small effort can turn the situation around? Effort has to be made to get to the end goal of achievement and success. Consider taking time to introduce yourself to someone new at your local meetings. When you meet a new member explain to them what position you hold. When people volunteer, get their information and send them to the right person. Do not let them get away! I challenge you to focus on the positive, the possibilities and the change when needed.

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LEISA REID is a speaker, trainer and author. On behalf of Productive Learning, a boutique personal growth company founded in 1992, she speaks for hundreds of groups throughout Southern California training on the power of the mindset. In 2013, she founded the OC Speakers Network, a talented group of presenters who collaborate and share speaking referrals.

Your Prosperity Mindset: Are You Leaving Money on the Table?

BY LEISA REID - SUBMITTED BY RIO HONDO DISTRICT LPA

How often have you heard people say they want to make more money? Probably a lot! It is a common topic of conversation, especially when we are out networking and talking to business professionals.

How often have you heard people say they want to investigate the thinking that got them the results they currently have? Probably never (or at least very rarely)! It is often easier to blame external circumstances (e.g., the economy, lack of good leads, not enough time, no support) for our current situation rather than look at where we played a part in our own reality.

It is critical that we investigate our own thoughts and feelings when it comes to our business and prosperity. How can we have a prosperity mindset if we don't even know what we are thinking and feeling? In our culture it is popular to look at our actions and start making a list of "to-do" items when we set our goals. Yes, action is critical, but so are our thoughts and feelings.

Let's put it into play....

What type of prosperity would you like to see in your life by the end of this year? Go ahead and jot it down or make a mental note of your answer.

Now, what actions would you need to take to make that goal a reality? Feel free to jot those actions down too or make more mental notes.

Ok...so what feelings would you need to have to take those actions? Excited? Confident? Enthusiastic? Do you know what feelings you have about it currently? Time to get honest with yourself and contemplate this question. Understanding this step and diving deep will get you closer and closer to your ideal prosperity.



And what thoughts would you need to generate those feelings? Most people have a hard time with this one - we are so "in our own stuff" that we can't imagine another way to think about our goal so I'm going to give you some examples to get the juices flowing. "I am so excited about launching my new product!" "My confidence is through the roof when I think about what I'm going to achieve!" "I can already see the balance in my bank account rising."

When you are stuck, you can go back to this formula and start investigating why you are not getting the results you want. The more you understand your thoughts and feelings regarding prosperity, the less money you will leave on the table.

When we continue to do the same thing over and expect different results...well, you know the rest of the story. So today you can use the above questions and shake it up. Each time you go through this process, you are increasing your awareness muscle. The more awareness you have of you, the more opportunities will be revealed and the more you will see the money on the table right in front of your eyes.

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LSS MEMBER Free with Advanced Reservations \$5 at the Door/After Deadline -- Handout Only: \$5	NON-LSS MEMBER \$15 with Advanced Reservation \$20 at the Door/After Deadline -- Handout Only: \$15
Friday, February 24 – 7:30 p.m. to 9:00 p.m.	
<u><i>Civil Litigation</i></u> Trial Preparation Lauren Diaz and Vanessa Buffington NextGen Legal <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u><i>Probate and Estate Planning</i></u> Small Estate Probates and Alternative Options Jennifer L. Ellington, Esq. <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
Saturday, February 25 – 10:30 a.m. to 12:00 p.m.	
<u><i>Criminal and Family Law</i></u> Sexually Violent Predators: Criminal and Civil Aspects Brandon Williams, Esq. <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u><i>Federal Law</i></u> Basics of Federal Antitrust Law, With Case Study Mark Lasser, Esq. <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
Saturday, February 25 – 4:00 p.m. to 5:30 p.m.	
<u><i>Law Office Administration</i></u> Excel **No MCLE or CCLS credit will be given.** Tammy L. Hunt, CCLS <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u><i>Transactional Law</i></u> Maneuvering Legal Documents Through The Recorder's Office Miles Pustejovsky, Manager Butte County Recorder's Office <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER

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LELAND G. STANFORD, ESQ. (Deceased) was admitted to the State Bar of California in September of 1951. He is a distant relative to the Stanford University "Stanfords." He was a founder of the Balboa Law School now California Western School of Law, and was appointed Law Librarian in San Diego. Under Mr. Stanford's leadership, the Library's collection grew to 50,000 volumes by 1955 and tripled to 150,000 volumes by 1971, when he retired. During this time, the present building located at 1105 Front Street was planned, built and dedicated in 1958.

The Sisters in Law

BY LELAND G. STANFORD ESQ. - SUBMITTED BY SAN DIEGO LSA

This is an article from a series on local legal history by the San Diego County law librarian, originally printed on Wednesday, November 4, 1964. Reprint was granted by the Trustees of the Law Library Justice Foundation

§3. LEGAL SECRETARIES

Turn-of-the-century law practice, even when successful, was only as opulent as the room's pot-bellied stove. Law books in dingy cases crowded to the ceiling from whence the dandruff of their scaling sheepskin covers settled on uncouth shoulders of oak tables bruised as an ageing wrestler. Even old Jim, the clerk, probably smelled like an old gymnasium.

The feminine secretary in today's law office has replaced with spinnaker'd sprightliness the barge-like motivations of an earlier practice. With a couple of yards of blousing silk, and a rope of pearls for a hawser, she has thrown to the clean fresh winds of the practice-run the graceful sales of a Challenge Cup contender.

A constructive law practice today, even at the lower girders level, displays all the cutting brilliance of an acetylene torch, and, what is worse, the pressures! It is open to question whether lawyers would tolerate their 20th century lot without the soothing economic complementarism of the sexes that has become prosaic throughout the profession. It is more than prosaic. The poet author of "Hiawatha" almost said (but not quite):

*As the string unto the bow is, so the legal secretary
Is to him who gives employment; though she bends
him she obeys him,
Tho she draws him yet she follows; useless each
without the other.*

San Diego is internationally prominent in the National Association of Legal Secretaries. Mrs. Louise Cord of this city was the first national president (1949). She also was one of the original organizers of the California



Legal Secretaries, and the first State President (1934-36). She was a charter member of the San Diego Association (1931) and its second president (1933-34). Mrs. Cord was secretary for Eugene Daney, Sr., for many years, and presently (1964) is secretary in the firm of Schall, Nielson, Boudreau & Price.

Mrs. Virginia Caperton, as Girl-Friday in the firm of Springer, Green & Morrison, was the moving force behind, and the first president of the San Diego Legal Secretaries Association. In the Daily Transcript in 1929 she saw a news notice of the world's first such organization in Long Beach, California and called together several acquaintances to pursue a similar project here.

In the Manual of Policy and Procedure, Fourth Ed., 1961, of the California Association appears the following:

The first Legal Secretaries Association was formed in 1929 in Long Beach, California. By 1934 associations had been organized in Los Angeles, San Diego, and Pasadena. At the instigation of the Long Beach Legal Secretaries Association representatives of the four groups met in Los Angeles on September 5, 1934, to discuss the formation of a state organization.

On December 8, 1934, the first official board meeting of the California Federation of Legal Secretaries was held in Long Beach, and the first officers of the state group were elected.

The Code of Ethics was written by Evelyn Atwood and was adopted by the board of governors of the Federation on December 8, 1934.

The first Legal Secretaries Bosses' Night was held in Los Angeles on February 13, 1935. (In San Diego, March 21, 1935). In May of that year the first annual convention was held in San Diego.

In July, 1940 the California Federation of Legal Secretaries was incorporated under the name of "Legal Secretaries, Incorporated."

Legal Secretary's Handbook (California) was first published and copyrighted in 1940. It was edited by Inez Ingram for the Legal Secretaries and Honorable B. Rey Schauer for the legal profession.

In 1958, the NALS-sponsored Professional Legal Secretary's course was adopted, and in 1960, the first examinations were given in San Francisco.

Legal Secretaries, Incorporated has for many years furnished volunteers to work at State Bar Conventions in California.

In August, 1955, Legal Secretaries, Incorporated, became affiliated with National Association of Legal Secretaries and was the first state organization to become part of NALS.

In October, 1962, the National Association of Legal Secretaries (organized 1949, Articles of Incorporation filed August 1, 1950) was composed of 16 State Associations, 224 local associations in 47 states, England, Puerto Rico and Japan, with a total of 7500 members. These persons subscribe to an admirable code of ethics.

Projects of the California legal secretaries include an intensive classroom training program, and publication of the popular Legal Secretary's Handbook. In each of these Mrs. Louise Cord has taken a leading role. She is instructing an evening class in 1964, and this writer recalls the first "Handbook" that she and her committee produced over 30 years ago. Its successor of the same name now is widely purchased even by attorneys for their own use.

Another project is the History Book Contest in which elaborate yearly scrapbooks of local chapters are judged at the State convention for effective recording of activities. Presently upon this writer's desk are a dozen of these beautiful volumes loaned by the differing past presidents of the San Diego Chapter. If the county law library ever could be made the official repository for these exquisite

compilations it would have one of the best sources of continuing legal history in this area, and a constant reminder of the years of devoted community service given by members of the local Legal Secretaries organization.

Probably no adequate encomium for his secretary ever has been penned by any San Diego lawyer. Many a local counselor, however, has given practical expression of ultimate praise by marrying her!

To my own secretary, Mrs. Nancy P. Milford, for example, must go all credit for a hundred trying hours of research and investigation prior to the actual one hour of scribbling these sentences.

And to those other legal secretaries of earlier years (one is my lovely wife, and two others now are fellows lawyers!) on my own behalf, and for a million attorneys of yesterday and today whose right hand man has been the girl left to do the work (and with some apologies to the writer of the 31st chapter of Proverbs):

Blessed art thou, O capable, virtuous woman; trustworthy art thou, and your value exceed the fine rubies. You have done only good unto me and no evil through all of our labors together. Diligent were your studies. Willingly you worked with your hands, and even have you arisen while yet it was night to prepare the necessities of our calling. Like merchant ships you have brought in food from afar while taking dictation, and gladly shared with your employer. You have girded yourself with strength, and have reached forth your hands when others were needy. You have clothed yourself attractively, yea, you have covered yourself with honor and wisdom. Your tongue has known only kindness, and idleness is not your companion. Many daughters have done virtuously, but thou hast excelled in loyalty and understanding. If it exceed the propriety to say We Love You, we yet shall arise up at the gates, and among the elders, to proclaim you as indispensable—and to call you blessed forever!

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LEVON SAGATELYAN, ESQ. joined Corey, Luzaich, de Ghetaldi, Nastari & Riddle LLP as Of Counsel after 37 years of leading a respected law firm and practice grounded in the traditions of the San Mateo County community. A former President of the San Mateo County Trial Lawyers Association and a member Emeritus of the Board of Directors of the organization, Mr. Sagatelyan serves a diverse and loyal client base in transactional and civil litigation legal matters. Actively involved in the San Mateo County Bar Association and its Probate and Estate Planning Section in particular, his practice emphasizes estate and trust litigation and estate planning and administration as well as general business, real estate and general civil litigation.

Mr. Sagatelyan has been serving as a Judge Pro Tem for the San Mateo County Superior Court for over 30 years, and is an Arbitrator for the San Mateo County Bar Attorney Client Fee Dispute Panel and is certified as an Arbitrator on the fee dispute panel for the State Bar of California.

Dad Wants to Change His Estate Plan — Really?

BY LEVON SAGATELYAN, ESQ. - SUBMITTED BY
SAN MATEO COUNTY LSA

After nearly 34 years of practice the interpersonal experiences which should alert a seasoned lawyer, and law office staff, to what may be the undue influence of a child over an elderly parent (your client) is often times not so obvious. What should the law firm do? That includes not just the lawyer, but the entire law firm community that may know a family as clients of the firm for a quarter of a century or more.



Your firm prepared the trust and attendant estate planning documents for a husband and wife years ago. Your firm may have done estate plans, as is common, for their children and spouses. I am sure many of you reading this can say absolutely this is the normal course of affairs for a law firm that provides legal services through various generations.

What is the protocol that the lawyer must engage in? What are some of the observations that staff can bring to the lawyer's attention when observing clients interacting in the waiting area and otherwise? We all think that it is common sense and we all believe it should be apparent immediately to any of us that someone is taking advantage of an elderly person including a child as to a parent. Unfortunately, that is not the case in all instances and the recognition of what is always subtle and not so transparent manipulation by a child of an elderly parent must be scrutinized by the attorney and, therefore, collectively by all members of the law firm.

Let's discuss the matter further by beginning with how the appointment was made for a longtime elderly client after a long-standing estate plan. Who called to make the appointment? The office staff that scheduled the appointment for the attorney might want to note that it was the child that called and not the elderly client (who otherwise is capable of making his own appointments). It certainly is relatively common for children of elderly parents to assist parents in many matters and to call to schedule an appointment. In and of itself this may not be an indicator of any undue influence, but it should always be noted.

Our firm prefers our receptionist or other staff (legal secretary or paralegal) to actually engage in an appropriate and cordial conversation prior to starting the appointment. I cannot tell you the number of times my staff has alerted me to perhaps what was some form of disagreement between a parent and a child, or observed some sort of medical condition or impairment which was obvious to them especially with reference to elderly clients, and especially if any of my staff had a history with that particular client. It is important that these observations be noted and

conveyed to the attorney if at all possible prior to the actual appointment. In fact, to the extent possible, it should be documented as well.

The client's child says "Mr. Lawyer, Dad wants to change his estate plan." At this juncture, should the lawyer then direct further inquiry as to how the estate plan is to be changed with the child, or should the attorney ask the child to step out of the office and engage in any discussions and questioning outside the child's presence with the elderly father alone? I hope the answer is obvious to everyone. Most importantly to the attorney that is faced with this scenario, is it possible, as a result of trust and confidence established over many years of a professional relationship with the client and the child, to initially allow the attorney to not question why he/she should not engage in further inquiry with both the child and the elderly father present. Of course, the critical question should be whether the child's presentation and/or elderly father's expression of changes to the estate plan is going to dramatically alter the long-standing equal division among all siblings to now dramatically favor one child.

Up to this point, there is no unequivocal evidence of undue influence but to ensure that the father's decision is willful and independent of any kind of influence by any one, requires very thorough inquiry of the father by the attorney alone.

I do not wish to use this article as a basis to cite statutory and case law which define and articulate standards of mental competence for either entering into contracts or executing and creating testamentary instruments. The purpose here is to use common sense and alertness to observe and be focused on the elderly client and the possible motives of others, namely children.

A note should be made that physical pain and discomfort as a result of a prolonged and chronic condition can cause cognitive impairment and can leave a person more susceptible to undue influence of a particular person especially if that person may be providing care and comfort. Under normal circumstances, such acts of care and affection for a parent by one child because of proximity or other reasons as against the inability or non-action of other siblings does not necessarily mean that a parent wants to disinherit or alter the distribution equally to all of his children.

Inquiries of subjects which may be red flags for susceptibility to undue influence of an elderly client obviously is going to be very subjective to each client and, in each circumstance, the attorney and staff should consider some of the following:

- Thoroughly inquire about the ongoing status of relationships between the elderly client and all of his/her

children. When was the last time the elderly client saw or spent quality time with all of his children? How often does each child visit the parent? Is there any acrimony between and among the children? What is the financial status of each child? Is any child having serious financial problems? These types of inquiries should be made in an orderly manner so the general question of why you want to change your estate plan is asked to the elderly person so that he or she cannot give a pat answer.

- Inquiry regarding health should include when was the last time the elder client saw his/her doctor? Perhaps even obtaining written authorization to communicate with the client's doctor could be essential in the due diligence necessary to ensure the client is acting and making decisions on his/her own behalf.
- Sometimes it is appropriate and useful to ask a staff member to come in and sit in on the meeting with the elder client. This can provide a great sounding board and a second opinion based on an objective observation of the elderly person. This all may seem quite intrusive in many ways, but if the central purpose is full exercise of the lawyer's fiduciary relationship to the law firm's long-standing client and, therefore, to ensure that the client's last wishes are truly their own then no stone should be left unturned and no process should be rejected to satisfy the attorney that his or her client is doing what he or she wants to do.
- There is a great deal of debate as to the usefulness and appropriateness of videotaping an elderly client to verify the client's competence in making a late in life estate plan change.
- The other approach, assuming the attorney has satisfied himself or herself that the elderly client is capable and sincerely wants to make a dramatic change in the estate plan favoring in effect one child over others, is to suggest that the change be presented at a meeting at the attorney's office with all the family members present.
- When an elderly client comes in and asks the attorney to prepare documents to transfer title to real property and or liquid assets as a gift for the benefit of one child over other siblings.

I assure you after 34 years it is easy to trust your clients and their children and make assumptions. Clearly the goal of the lawyer and the law firm as a whole should be not to make any assumptions under any circumstances no matter how well you know someone, or you believe you know someone, the focus should always be to protect and ensure your client's sacred right and last wishes.

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California Certified Legal Secretary
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Mail Application, copy of LSI Membership Card (if applicable), and fees to:
April K. Ignaitis, CCLS, CCLS Certifying Board, P.O. Box 2879, Cupertino, CA 94015

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Saturday, March 18, 2017

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Saturday, October 21, 2017

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

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Supervisor's Email: _____

Summary of Duties: _____

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

Date: _____

Applicant Signature _____

*Fees subject to change without notice.

Rev. November 2016

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, info@lsi.org, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p>ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10TH Avenue, Suite 1000 San Diego, CA 92101 Office: (858)886-9842 Cell: (510)919-9062 jory@athletesbiz.com California Insurance License: 0E88330 10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:

Heather Edwards, LSI Vice President
LSI Marketing Committee Coordinator
(818) 482-7040
heatheredwardslsi@aol.com



JUDITH WILLIAMS is the president of Southern Butte County LPA, co-Chair of the February Conference, and has been a member of LSI since 1990. She has owned an independent paralegal office since 1989, and also serves as a notary public and registered process server to the general public. She is a graduate of Chico State University and holds two Masters degrees and a writing credential.



Welcome to the “Roaring Twenties” in Butte County

BY JUDITH WILLIAMS - SUBMITTED BY SOUTHERN BUTTE COUNTY LPA

Welcome back to Southern Butte County LPA’s third quarterly conference in Chico and experience an unforgettable weekend with memories of the “Roaring Twenties.” Southern Butte County LPA is looking forward to showing you a terrific time, along with wholesome hospitality on February 24-26, 2017.

For those of you who made the trek in 2006 to Chico, our conference will once again be held at the same location at the Ramada Plaza, previously known as the Holiday Inn. Room rates are \$79 for single or double occupancy, plus, there are suites available. Please call for further information and availability as we only have 50 rooms reserved. All rooms are non-smoking, and microwaves and/or mini-refrigerators will be on a first-come/first serve basis. You may mail in your reservation or contact the Reservation Desk directly at the Ramada Plaza (530)345-2491. Make sure you mention you are part of the LSI Quarterly Conference. Please note, there is plenty of free parking.

The Ramada Plaza is located right off Highway 99 with easy access on and off the freeway. If driving, take the Cohasset Road exit; bear left (West) to the stop light. You will be going up and over the freeway to the intersection, taking a left turn into the Ramada Plaza parking lot on the other side of the freeway. The hotel has a Cardio Fitness Center, outdoor pool, spa, and room service. Each room has in-room voicemail and data ports, coffee makers,

hairdryers, irons and ironing boards, TV with movies “On Demand,” and all the free ice you can handle!

If you are flying into Sacramento International Airport, you will have an approximate 1½ hour drive. When leaving the airport, head eastward toward downtown Sacramento on Highway 5 to Highway 99. Take the Redding turnoff (also Yuba City/Marysville). Follow the signs north to Yuba City/Marysville. Take the left fork to Yuba City on Hwy 99 (north) where it splits to Yuba City. Go through Yuba City, Live Oak, Gridley, and continue north all the way to Chico. Once in the city limits of Chico, follow 99 to Cohasset Road. Go over the overpass and left at first light.

Our Friday night receptions theme is the “Roaring Twenties” where there will be a scrumptious array of colorful foods to consume, as well as tapping your feet to the tunes of the 20s, taking pictures with standing scenes of the era, while visiting our carefully chosen vendors. One of the highlights of the conference will be centered on how clever you are in guessing who the murderer is in our game of CLUE! Clues will be given in several designated

WELCOME TO THE “ROARING TWENTIES” IN BUTTE COUNTY

areas leading to the next clue, beginning with your boodle bag. It is up to you to gather each clue to the finale and turn in your ticket at the Saturday Night Banquet when the winner will be determined and announced on Sunday morning for a prize and a job well done! Additionally, you will have the opportunity to attend two different workshops scheduled that evening.

Saturday’s coffee break, luncheon and banquet will glean more clues to see who dunnit.

Saturday will also deliver two more LSS classes in the morning before the Governor’s meeting at 9:00 a.m. At 12:15 p.m., the Governors, Presidents, and Membership Luncheons will be held. You may also choose to dine at the on-site restaurant or any one of the local restaurants within walking or a short driving distance of the hotel. Then again, you may want to lay by the pool! The afternoon will provide two more classes and a workshop. For those of you who want to partake in historical sites, there is Bidwell Mansion, Chico State University, quaint shops and boutiques. And true shoppers may travel back over the highway leading to North Valley Plaza offering Starbucks, Trader Joe’s, and Tinsel Town Theatre. Travel south on the freeway a bit to 20th Street to our large Chico Mall with 85 shops and businesses under one roof including, Sears, Forever 21, and JC Penney’s. Close by are Outback, KFC,

Best Buy, Starbucks, and T-Bar Coffee House. ‘Restaurant row’ features Red Lobster, Olive Garden, Applebee’s, IHOP, and In N Out Burger off 20th Street and Hwy 99.

Saturday evening’s entertainment will be a dancing extravaganza to watch and join in. Your final clue will be given and your “who dunnit” ticket will be turned in. If you aren’t too tired by the end of the evening, Saturday night really “rocks” downtown, or stay in the hotel at the hotel’s Lounge just outside of the banquet room for continued entertainment. No need to travel to enjoy the rest of the evening! On the other hand, if you still can’t sleep because you are hearing the gentle clinking of coins in the back of your mind, Oroville is only 30 minutes away where there are two great casinos. Directions to Feather Falls and Gold Country Casinos are also in your boodle bag.

At the Sunday morning brunch, the winner of the “who dunnit” Clue game will be announced and a prize given. There will be a scrumptious breakfast served with plenty of comfort food. When the Board of Governor’s meeting closes, we’ll say goodbye until the 2017 Annual Conference at the Doubletree Hotel in Modesto.

So mark your calendars now and make your reservations! Come to our party and travel back to the “Roaring Twenties” in Butte County.

LS

Dates to Remember in 2017

- February 14, 2017** LSI 3rd Quarterly Conference registration due
- February 17, 2017** Registration deadline for Legal Specialization Sections Seminars at February Conference
- February 18, 2017** Last day to submit CCLS Exam Application to the CCLS Certifying Board with payment of late fee
- February 20, 2017** Registration deadline for CCLS Workshop at November Conference California Legal Procedure Part 2
- February 24-26, 2017** LSI’s 3rd Quarterly Conference
Ramada Plaza, Chico
Hosted by Southern Butte County LPA
- March 1, 2017** Last day to submit articles for May issue of The Legal Secretary
- March 13, 2017** Registration due for Overview of California State Court Discovery
- March 13, 2017** Overview of California State Court Discovery class begins
- March 18, 2017** CCLS Exam



LEGAL SPECIALIZATION SECTIONS

2016-2017 MEMBERSHIP FORM

August 1, 2016 – July 31, 2017

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; discounted LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities.

	✓	LSI Member New/Renewal	Non-LSI Member New/Renewal
I would like to join all six sections!		\$75	\$150
Civil Litigation		\$20	\$40
Criminal/Family Law		\$20	\$40
Federal Law		\$20	\$40
Law Office Administration		\$20	\$40
Probate/Estate Planning		\$20	\$40
Transactional Law		\$20	\$40
Total Paid:			

This information will be listed in the roster that is distributed to all LSS members.

Name: _____ ☐ CCLS ☐ PLS ☐ CLA ☐ Paralegal

E-Mail Address: _____

Firm/Business Name: _____

Address: _____

If LSI Member, which Local Association or Member at Large: _____

Phone: _____ *I prefer to receive my newsletters via USPS* ☐

Method of Payment: ☐ Check payable to "LSI" enclosed ☐ Pay Online at www.lsi.org via credit card

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

Send to: Dawn R. Forgeur, CCLS, Legal Specialization Sections Coordinator
c/o Stoel Rives LLP, 500 Capitol Mall, Ste. 1600, Sacramento, CA 95814

YEARS OF LEGAL EXPERIENCE: _____

SPECIALTY(IES): _____

FAMILIAR WITH THE COUNTIES OF (Please indicate each County, not area):

CCLS QUIZ:

CALIFORNIA LEGAL PROCEDURE - CIVIL

DIRECTIONS: ANSWER TRUE OR FALSE FOR EACH STATEMENT BELOW.

1. A corporation may not sue or be sued.
2. A voidable marriage can become valid.
3. An uncontested dissolution proceeding is one in which the respondent has not filed a response.
4. Documents transferring title to real property must be filed in the county where the grantee resides.
5. In estates being settled under "intestate" proceedings, property is distributed according to the laws of "intestate succession" and generally go to the closest relatives of the decedent.
6. A statement of information for an LLC must be filed every year.
7. Adultery is not one of the grounds for dissolution of marriage.
8. In probate, an Inventory and Appraisal should list the decedent's assets disposed of prior to the date of death.
9. A homestead declaration will protect the entire value of one's home from a forced sale.
10. A self-proving will is one which is witnessed under penalty of perjury.

CCLS QUIZ ANSWERS ON PAGE 32

Want to Get Published?

Looking to Contribute an Article?

LSI is always looking for articles geared toward the legal community.

If you are interested, please contact:
Editor, *The Legal Secretary*
Barbara Barregar at LSI.TLSeditor@gmail.com

ANSWER KEY TO P. 31 QUIZ

1. False
2. True
3. False
4. False
5. True
6. False
7. True
8. False
9. False
10. True

Quarterly Assignments

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

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



OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY

LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing March 13 and ending April 24, 2017. During the classes, the following topics will be covered:

Interrogatories
Demand for Production of Documents
Requests for Admissions
Depositions

Demand for Physical Examinations
Deposition Subpoenas
Discovery Timelines and Service
Verifications

CLASS SESSION OPENS MONDAY, MARCH 13, 2017

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

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

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

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

Name: _____ Email: _____

Address: _____

City/Zip: _____ Telephone: _____

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

\$50 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)

Name on Card: _____

Visa/MC Credit Card # _____

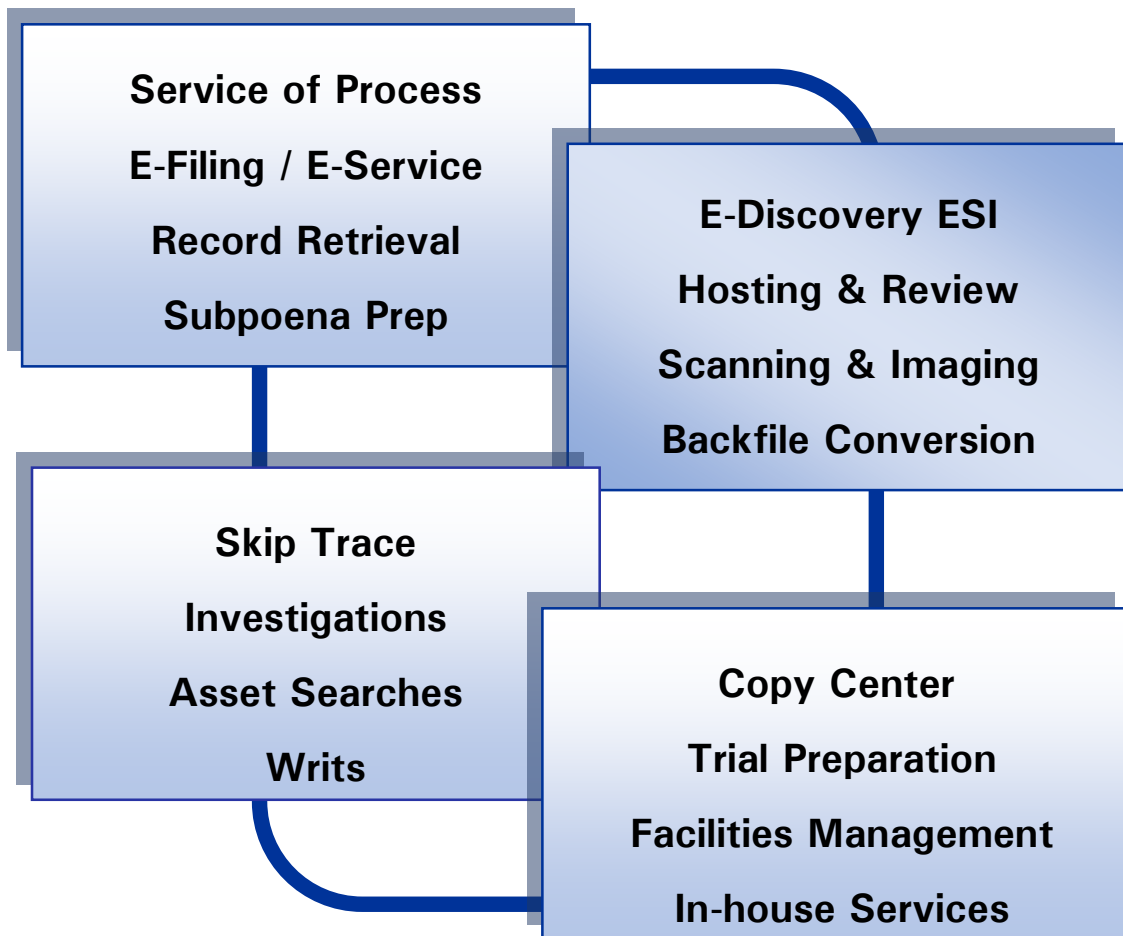
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN March 13, 2017, to training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after March 13, 2017. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals



Serving the Legal Community since 1972



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619-233-9700

sales@knoxservices.com

www.KnoxServices.com

Helpful Websites



Supreme Court of the United States

<http://www.supremecourt.gov>

Office of the Attorney General

www.ag.ca.gov

California Courts

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

California Association of Legal Support Professionals

www.calspro.org

California Codes

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

California State Bar

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

California Legislative Information

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

U.S. Citizen and Immigration Services

<http://www.uscis.gov>

Public Access to Court Electronic Records

<http://pacer.gov>

American Medical Association

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

American Association of Law Libraries

<http://www.aallnet.org>

National Notary Association

<http://www.nationalnotary.org>

California Secretary of State

www.sos.ca.gov

2017 California Court Holidays

Monday, February 13

Lincoln's Birthday

Monday, February 20

Washington's Birthday

Friday, March 31

César Chávez Day

Monday, May 29

Memorial Day

Tuesday, July 4

Independence Day

Monday, September 4

Labor Day

Monday, October 9

Columbus Day

Friday, November 10

Veterans Day

Thursday, November 23

Thanksgiving Day

Friday, November 24

Day after Thanksgiving

Monday, December 25

Christmas Day



LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	QUANTITY	UNIT PRICE	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms.(no charge for pdf download @ www.lsi.org)		5.00	
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam.		N/C	
CCLS STUDY GUIDE Sample questions and answers to assist in preparing for all sections of the CCLS Exam.		25.00	
CCLS STUDY KIT SECTIONS All sections include suggested 10 and 18 week syllabi.			
CALIFORNIA LEGAL PROCEDURE (CLP) CLP section of the CCLS study Guide, CLP Worksheets, CLP Study Tips, list of additional references required for CLP		30.00	
LEGAL TERMINOLOGY (LT) California Style Manual (book included with section), LT section of CCLS Study Guide, LT worksheets, LT study tips, list of additional references required for LT		50.00	
LEGAL COMPUTATIONS (LC) LC section of CCLS Study Guide, LC Worksheets, LC Study Tips, List of additional references required for LC		30.00	
SKILLS (SK) SK Section of CCLS Study Guide, SK Worksheets, SK study tips, list of additional references required for SK		30.00	
ABILITY TO COMMUNICATE EFFECTIVELY (ACE) Gregg Reference Manual, 11 th ed. (book included with section), ACE section of CCLS Study Guide, ACE worksheets, ACE study tips, list of additional references required for ACE		199.00	
LAW OFFICE ADMINISTRATION (LOA)** <i>Pocket Guide to Legal Ethics</i> (book included with section), Secretary of State Notary Public Handbook, LOA section of CCLS Study Guide, LOA worksheets, LOA study tips, list of additional references required for LOA		70.00	
REASONING & ETHICS (R&E)** <i>Pocket Guide to Legal Ethics</i> (book included with section), California Rules of Professional Conduct, Secretary of State Notary Public Handbook, R&E section of CCLS Study Guide, R&E worksheets, R&E study tips, list of additional references required for R&E		70.00	
** If LOA and R&E are purchased as individual sections at the same time, there is a \$40.00 discount because the same reference book is included in both sections.			
COMPLETE CCLS STUDY KIT (ALL 7 SECTIONS)		199.00	
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference.		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.		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.		5.00	
HISTORY OF LEGAL SECRETARIES INCORPORATED A 50-page memory of people, places and events since 1929.		5.00	
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form.		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.	ALL	\$65.00	
TEACHER TRAINING CHAPTER (Rev. 5/2015)		4.00	
ADOPTIONS CHAPTER (Rev. 5/2015)		7.00	
CIVIL PROCEDURE CHAPTER (Rev. 5/2015)		7.00	
CONSERVATORSHIP/GUARDIANSHIP CHAPTER (Rev. 5/2015)		7.00	
CORPORATIONS CHAPTER (Rev. 5/2015)		7.00	
COURT STRUCTURE CHAPTER (Rev. 5/2015)		7.00	
CRIMINAL LAW CHAPTER (Rev. 5/2015)		7.00	
DISCOVERY CHAPTER (Rev. 5/2015)		7.00	
FAMILY LAW CHAPTER (Rev. 5/2015)		7.00	
PROBATE CHAPTER (Rev. 5/2015)		7.00	
REAL ESTATE CHAPTER (Rev. 5/2015)		7.00	
UNLAWFUL DETAINER CHAPTER (Rev. 5/2015)		7.00	
WORKERS' COMPENSATION CHAPTER (Rev. 5/2015)		7.00	
MISCELLANEOUS CHAPTER (Rev. 5/2015)		7.00	
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.		30.00	

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	QUANTITY	UNIT PRICE	TOTAL
LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI Governors.		5.00	
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form.		N/C	
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered and reasons for joining. Includes Section Membership Application.		N/C	
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application.		N/C	
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.		N/C	
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	
CCLS PIN A 1/2" high, 10-karat gold filled pin with CCLS logo. For the CCLS.		35.00	
LSI MEMBERSHIP PIN* 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 GOVERNOR'S PIN* A 3/4" high round gold-tone pin with white enamel overlay. LSI logo in center and "LSI Governor" inscribed in circumference. For local association Governors. Pin back.		10.00	
PRESIDENT'S PIN* Same as pendant (see above).		7.00	
LSI TOTE BAG		10.00	
TOTAL THIS PAGE			
TOTAL PREVIOUS PAGE			
TOTAL ORDER			
MAILING/SHIPPING AND HANDLING (15% OF TOTAL ORDER)			
SUB-TOTAL, INCLUDING MAILING/SHIPPING AND HANDLING =			
CALIFORNIA SALES TAX 8.5% (OF SUB-TOTAL ABOVE) +			
TOTAL DUE =			

*Item available to LSI members only.

PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL IMMEDIATE REQUIREMENTS. COMPLETE PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO LEGAL SECRETARIES, INCORPORATED, 2520 VENTURE OAKS WAY, SUITE 150, SACRAMENTO, CA 95833, OR FAX TO (916) 924-7323. CHECK OR CREDIT CARD INFORMATION MUST BE INCLUDED. ORDER WILL BE MAILED OR SHIPPED WITHIN 10 DAYS OF RECEIPT, SUBJECT TO AVAILABILITY.

DELIVER TO: NAME _____ ASSOCIATION _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DAY TELEPHONE () _____ E-MAIL _____

Method of Payment: Check, payable to "LSI," enclosed ☐ VISA ☐ MASTERCARD ☐

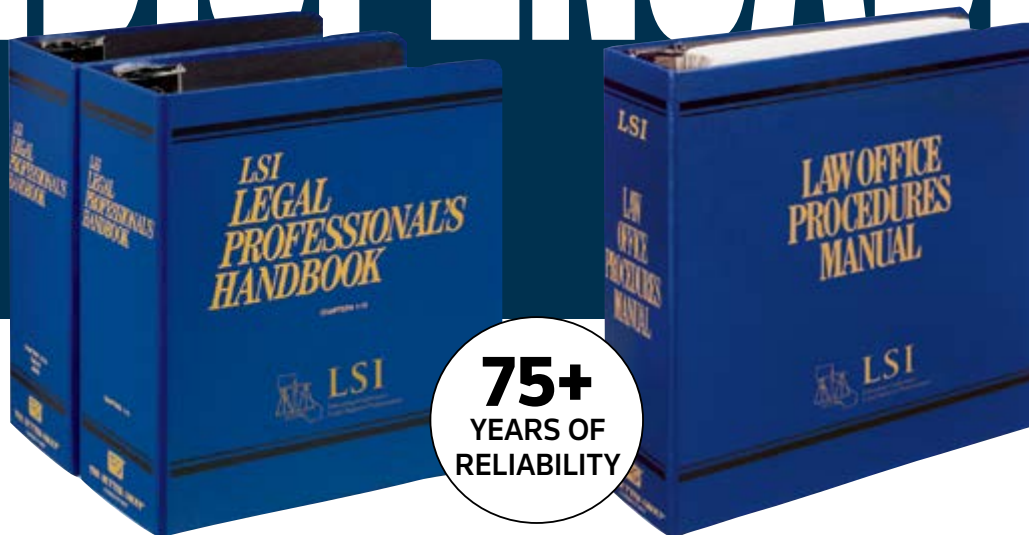
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Expiration Date: Month _____ Year _____

Name on Credit Card: _____ Card Verification Number _____

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

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LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

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

LSI MEMBERS-ONLY PRICE\$296.80
Nonmembers Price.....\$424

Price includes shipping. Add applicable sales tax.
This title is updated annually for subscribers by replacement pages.

LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

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

LSI Members-Only Price.....\$178.50
Nonmembers Price.....\$255

Price includes shipping. Add applicable sales tax.
This title is updated bi-annually for subscribers by replacement pages.

Buy both LSI books together and get a discount!
Combo price for both books.....\$465
Price includes shipping. Add applicable sales tax.

COMPILED BY

LEGAL SECRETARIES, INCORPORATED

PUBLISHED BY

TRG THE RUTTER GROUP™



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LSI IS ACCEPTING SCHOLARSHIP APPLICATIONS FOR THE 2017-2018 SCHOLARSHIP YEAR.

**LSI WILL BE AWARDING UP TO SIX \$1,500 SCHOLARSHIPS TO
PERSONS DESIRING A CAREER IN THE LEGAL FIELD. ***

Applicants must be legal residents of the State of California.

Applicants must be attending school within the State of California
during the scholarship year.

Applicants must be enrolled in a program of no less
than six months in duration.

LSI members are not eligible, although local associations are greatly
encouraged to sponsor high school and college students to apply.

* A career in the “legal field” includes (i) legal secretary; (ii) legal assistant (including
paralegal); (iii) court reporter; and (iv) law office administrator.
Scholarships are not intended for students planning to enter law school.

APPLICATIONS MUST BE POSTMARKED BY APRIL 1, 2017.

For more information,
visit our scholarship page at
www.lsi.org



2016-2017 LSI Roster



ELECTED OFFICERS

President
JENNIFER L. PAGE, CCLS
Cell: 415-710-3402
E-mail: jlpagex@ix.netcom.com

Vice President
HEATHER EDWARDS
Cell: 818-632-6647; Work: 818-827-5159
E-mail: heatheredwardslsi@aol.com or hedwards@alpertharr.com

Executive Secretary
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