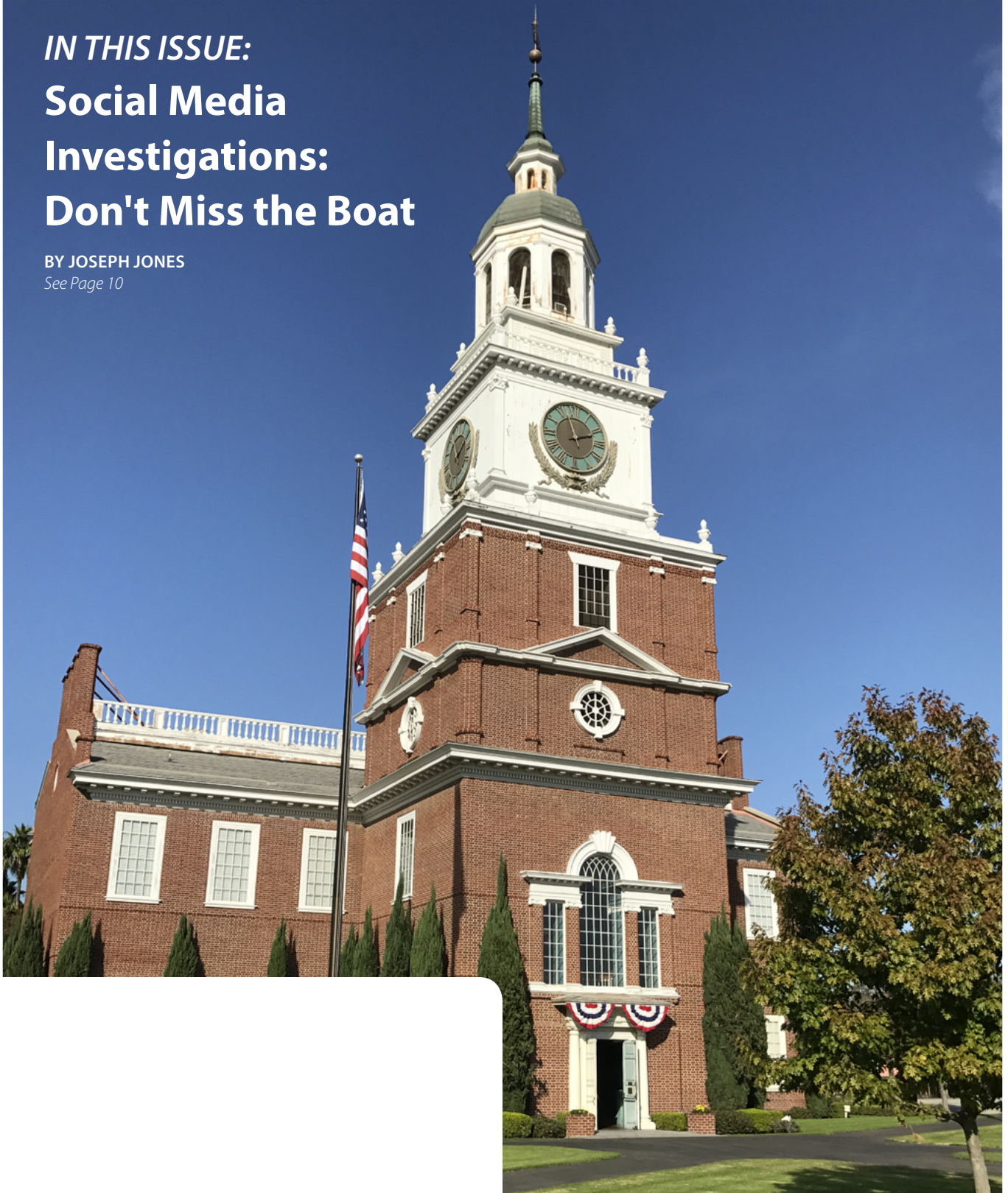


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Don't Miss the Boat**

BY JOSEPH JONES
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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 Raggianti Freitas LLP embarking on the next adventure in her legal career working for seven 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. She is currently serving as LSI President.

Jennifer obtained her CCLS designation in October 2008.

Jennifer resides in Novato, California with her husband of 23 years Tony, and their 17 year old daughter Emma.

TO RUN, OR NOT TO RUN? TO PARTICIPATE, OR NOT?

When I joined LSI and Marin County LPA in 1991 I had absolutely no intention of being anything but a “member” of this great organization, and to network, attend educational seminars and meet new friends who had similar career goals. I attended monthly meetings, met wonderful women, learned from our speakers and really stayed in my Marin County LPA bubble. I had no real concept what LSI was other than it was the parent organization. This worked for a few years. Then I was asked to be a member of the board of my local association. I thought “why not?” And I accepted the position of Vice President. As the years went on I held various chairmanships and have been President several times. At first I was terrified of holding such important positions. I pictured myself the “worker bee” and never the leader. Why would anyone want to pay attention to what I had to say, accept my ideas, and have confidence in my ability to lead our group?

In May 1993, I attended my first LSI Conference. It was an Annual Conference in Oakland, California and Cheryl Woodson, CCLS, was the current and incoming President of LSI. I was overwhelmed and so excited at the same time. I attended workshops, luncheons and General Assembly of the Board of Governors. I was completely bowled over – I found myself among an incredible group of legal professionals. The educational workshops were top notch, luncheons informative, and the opportunity to network with legal professionals from all over the state of California was incredible. I was officially hooked.

I served my association as Governor and learned to let my voice be heard; not only did I get over the fear of addressing a room full of people, but I represented my local association which meant asking questions, expressing an opinion, getting more information on something that wasn't quite clear to me or my members. I could no longer just sit among the crowd and observe, I was now participating.

Over the years I have grown to love being a participant. I may not always have the best ideas or ask the right questions, but, I have learned that it's okay for my voice to be heard, to express opinions and question something that doesn't make sense. I have been lucky enough to moderate the Newcomers Workshop and Luncheon several times and have thoroughly enjoyed sharing the world of LSI with others.

In 1999 I was first asked to be an LSI chairman. Again, another opportunity to grow, learn and participate. Since then, I have been honored to hold various positions in LSI. Each assignment has brought a new set of challenges, but, I still considered myself a “worker bee” and not a leader.

PRESIDENT'S MESSAGE

On May 10, 2008, I was honored and humbled to receive the President's Award presented by Lorraine M. Bettencourt, PLS, CCLS, LSI Past President 2006-2008. Receiving this award validated all the hard work and effort I put forth for LSI. The award sits on my desk at work and is a constant reminder that my dedication to LSI and my local association is worth the effort.

I was happy to serve LSI as a chairman and had no intention of climbing any further up the ladder. However, a few LSI members came up to me and posed that terrifying question: "Why don't you run for LSI Treasurer?" Followed by, "you'd be a terrific officer for LSI." Never mind that I had no bookkeeping experience and had no interest in doing so. At the time my daughter was quite young, I was studying to pass the CCLS exam, I had a husband, extended family, etc. I pushed those questions aside and was determined to continue being a "worker bee" until I started to really think about my contributions to LSI and the membership. I have enjoyed working with others for the betterment of LSI and legal professionals that attend the conferences, our fellow members and those who seek out LSI for networking and education. I decided to go for it! And, in May 2016, I had the honor and privilege of being installed as President of LSI. My term will be over in May 2018, and I am sad that it is coming to an end, but, I wouldn't change one minute of my time dedicated to LSI.

If you are thinking about tackling this journey, I would encourage you to do so. Every single member of LSI has a voice, ideas, and something to share. If LSI is to continue into the future, it needs strong individuals to keep it moving forward. I have met many of you over the years and I do believe there are many of you who could take on this journey and make significant contributions to LSI and its membership. Yes, we all have our own lives, families,

friends, work outside of LSI but I would ask you these questions: "Why did you decide to join LSI?" "What do you expect to receive as a benefit of being a member?" "Do you have ideas that would help LSI continue on into the future?" "Do you enjoy being part of a successful team?" If you answered yes to more than one of these questions, you may well have what it takes to be a chairman and maybe even a leader.

When I began this journey, I had no idea what an incredible experience this would be and who I would become along the way. I have found a new level of confidence in myself that has spilled over into my day-to-day life both personally and professionally.

Do I still get a bit spooked addressing a crowd? You bet! Do my palms still sweat, my legs go weak? You bet! Does my heart race just before I open my mouth? You bet! If these things didn't happen, I would think something is wrong. No one wants to fail or be criticized. But, failure and criticism make you stronger.

I would encourage each and every one of you to consider serving LSI in some capacity. Contact the incoming President and ask to be a chairman or committee member. Take that first step, take a deep breathe and PARTICIPATE!

LS





KRISTI L. EDWARDS, CCLS has been a legal secretary for over 25 years. She is legal assistant and office manager for Froneberger & Leviloff in San Rafael, a transactional and estate law firm specializing in estate planning, probate litigation and conservatorships. She is an honorary member and has held all offices of Marin County LPA, along with many chair positions. She served LSI as Probate Section Leader for 3 years and is now in her second year as Parliamentarian. She is a member of the Marin County Bar Association in the non-attorney category. She and her husband of 43 years live in Novato and enjoy hiking and following the local Pacifics baseball team, the SF Giants, and Golden State Warriors.

Annual Conferences and Delegates are Special

SUBMITTED BY KRISTI L. EDWARDS, CCLS
LSI PARLIAMENTARIAN



I've been attending LSI conferences for a long time now – since about 1996 I think – and for most of that time, I have not really understood the subtle differences between Quarterly Conferences and Annual Conferences. Now that I am serving as the Parliamentarian, I find that Roberts Rules has an entire section on conventions. [See RONR, (11th ed.) Chapter XIX.] This chapter provides the rules for an assembly of delegates, specially chosen to represent the membership of an association, who sit as a single deliberative body and act in the name of the entire group. There are several terms used to denote this assembly and LSI uses the term: Annual Conference.

The rules for our Annual Conference are found in many places, often confounding the host association and driving the chairman of Annual Conference somewhat crazy. LSI Bylaws address the rules for choosing the time and location of Annual Conference and the rules about Delegates: their voting rights and the quorum, the minimum number of Delegates required to transact business. LSI permits each local association to send 3 Delegates to the Annual Conference and limits the selection of those Delegates from among active members. Each local association's bylaws should clearly define how their Delegates will be chosen. If you are selected as a Delegate, read both your local association's bylaws and the LSI Bylaws regarding Annual Conference so you will understand your responsibilities.

Duties of Delegates include an obligation to attend the Conference, be present at all the business meetings, and report back to the local association about what transpired. "A delegate is free to vote as he sees fit on questions at the convention, except as his constituent unit may have instructed him in regard to particular matters scheduled for consideration." [RONR, (11th ed.), p. 605, ll. 26-29.] There is also a good section in Brass Tacks (pg. 51) about Delegates' duties.

More rules are LSI Standing Rules section 3. Most of the standing rules are about the bidding process a local association must follow if they want to host a conference, but a particularly important one is 3.12 – The Annual Conference Standing Rules and Election Rules shall be printed in the Annual Conference Program. Why is this so important?

Annual Conferences operate on a closely controlled schedule, transact a lot of business, and include seminars, workshops, luncheons, committee meetings, etc. There are usually many more attendees at Annual Conference than a Quarterly Conference, putting more pressure on the schedule. To have a well-organized event, special Annual Conference Standing Rules are adopted at the beginning of the first session. It's important that Delegates read and understand these Standing Rules, so they are printed in the Annual Conference Program. Delegates will learn they must wear their name badges at all meetings and follow a particular check-in, check-out system with the LSI Registrar. In addition, the primary function of the Delegates will be to elect the Officers of LSI and the Election Rules are printed in the Annual Program for the Delegates' easy reference.

Finally, the agenda for the entire Conference is printed as the Schedule of Events, including biographies of speakers, times and locations of meetings, workshops, seminars, etc. Thus, the Annual Conference Program serves as an official record of the Conference and it too is adopted by the assembly at the beginning of the Conference. It is an important document, and should be as accurate and typo-free as possible.

Probably the most confusing thing about LSI Annual Conferences is that two sessions of the Board of Governors are held. The Pre-Annual Conference BOG meeting occurs in the morning before the first session of the Annual Conference. It is the last business meeting of the fiscal year, involves the out-going Governors and is used to conclude business of the prior year. The Post-Annual Conference BOG is held immediately following the final session of the Annual Conference on Sunday. The incoming Governors address new business, including voting on the budget for the next fiscal year.

To aid incoming Governors, they are welcome to attend the Governors' Luncheon at the February Quarterly Conference with the current Governor from their association.

Annual Conference is an exciting event encompassing the end of one fiscal year and the beginning of the next. Candidates run for the highest offices in the association and elections are held. Business is transacted in all the committees of the association; workshops, seminars and networking opportunities abound; elected officers are installed and newly appointed officers and chairman are announced. The team is formed and LSI is now ready for the opportunities and challenges the new year will bring. Will you be a part of it? I hope so – see you at the Beverly Garland in May!

LS



LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM

“CCLS Mini-Mock Exam”

Third Quarterly Conference, February 23-25, 2018

Knott's Berry Farm Hotel, Buena Park, CA

Saturday, February 24, 2018, 7:30-8:30 a.m.

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

If you've ever been curious about the CCLS exam but have not yet taken the plunge, come to this workshop to get just a small taste of what sitting for the exam is like. This will be a 50-minute mini-mock exam covering all seven sections. This is a great way to dip your toes into the waters of the CCLS exam. Come prove that you, too, can do it!

REGISTRATION DEADLINE: February 21, 2018

Name: _____ Email: _____

Address/City/State: _____

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

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101, or by email to quinton@dsmw.com.

CCLS CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



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LSI's 2nd Quarterly Conference





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February 24, 2018
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Saturday, February 24, 2018, 11:00 a.m. to 12:00 p.m.	
<p style="text-align: center;"><u>Criminal and Family Law</u></p> <p style="text-align: center;">50/50 Custody Orders and Related Issues</p> <p style="text-align: center;">William Spiller, Jr., Esq. Law Offices of William Spiller, Jr.</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>	<p style="text-align: center;"><u>Civil Litigation</u></p> <p style="text-align: center;">Motions from Staff's Perspective</p> <p style="text-align: center;">Dennis Nakata, E-Discovery Project Coordinator Rutan & Tucker, LLP</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>
Saturday, February 24, 2018, 3:00 p.m. to 4:00 p.m.	
<p style="text-align: center;"><u>Law Office Administration</u></p> <p style="text-align: center;">Employment Law Updates for 2018</p> <p style="text-align: center;">Jonathan Fraser Light, Esq. LightGabler</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>	<p style="text-align: center;"><u>Specialty Law</u></p> <p style="text-align: center;">The Changing Role of Legal Secretaries in Insurance Defense Litigation - How to Adapt and Become an Indispensable Team Member</p> <p style="text-align: center;">Lisa J. McMains, Esq. Bassett, Discoe, McMains & Kargozar</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>
Saturday, February 24, 2018, 4:30 p.m. to 5:30 p.m.	
<p style="text-align: center;"><u>Probate and Estate Planning</u></p> <p style="text-align: center;">Elder Law: Conservatorships</p> <p style="text-align: center;">Christina McGonigle, Esq., CELA Mary Telford, Paralegal McGonigle & Hunsaker, LLP</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>	<p style="text-align: center;"><u>Federal Law</u></p> <p style="text-align: center;">Appeals</p> <p style="text-align: center;">Cynthia J. Mascio, ACP Atkinson, Andelson, Loya, Ruud & Romo</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>

Name: _____ ☐ CCLS ☐ Paralegal ☐ PLS

E-mail: _____ (please print clearly, confirmations sent via email)

Local LSI Association (if applicable): _____ ☐ LSA ☐ LPA

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BARBARA BARREGAR is a transactional secretary at Rutan & Tucker, LLP in Costa Mesa, CA, where she has worked for over 30 years. She is a member of Orange County LSA and is currently serving as the Parliamentarian and Reservations chair. She is a past LSI Legal Procedure Chairman (2008-2010), past LSI LSS Civil Litigation and LSS Transactional Sections Chairman (2014-2016), and is currently the LSI Editor of The Legal Secretary.

Come Join Us in Orange County For a Star Spangled Celebration!

BY BARBARA BARREGAR - SUBMITTED BY ORANGE COUNTY LSA

Orange County Legal Secretaries Association is excited to be hosting LSI's Third Quarterly Conference at the Knott's Berry Farm Hotel in Buena Park, CA on February 23-25, 2018 for a "Star Spangled Celebration"! Get out all of the red, white and blue clothing and accessories you own and bring it with you! Not only will we be celebrating our great country but we will be cheering on Team USA in the Winter Olympics.

The weekend will start off on Friday night with the welcome reception where Patriotic Snoopy and the gang will take center stage. Come casual and comfortable in your red, white and blue garb and enjoy the American picnic we have planned. We just may have to have a contest to see who's red, white and blue outfit is the best. A surprise guest may come for a visit too! On Saturday, we will have a "Star Spangled Celebration" at the banquet that evening so you should gussy up in your finest patriotic attire. To close out the weekend, we will celebrate Team USA at the "Go For the Gold" Sunday brunch so flags will be flying.

The Knott's Berry Farm Hotel is located close to some great shops, restaurants and entertainment venues, let alone it's adjacent to Knott's Berry Farm (America's 1st Theme Park). A perk at the hotel is that they sell discounted Knott's Berry Farm tickets at the front desk for \$42. The hotel amenities include the Amber Waves Restaurant and Bar, an outdoor heated pool, spa, and fitness center. They also offer a complimentary shuttle to Disneyland.

Within a few minutes' walk from the hotel is Knott's Marketplace, which has a variety of dining and shopping options. It's home to Virginia's Gift Shop, The Berry Market, a candy parlour, Cinnabon, the delightful Snoopy Headquarters, T.G.I. Friday's and the world-famous Mrs. Knott's Chicken Dinner Restaurant. Also within walking distance and to get an American history lesson is Knott's Independence Hall. It's an exact replica of the Philadelphia landmark where you can hear an audio recording of the dramatic debate that led to the drafting of the Declaration of Independence and the creation of the United States of America. Admission is free.



Within a few miles of the hotel there are lots of things to see and do. For instance, you can't leave town without making a trip to Porto's Bakery & Cafe (a wonderful Cuban bakery with the best pastries, desserts, sandwiches, and their famous potato balls), Rock & Brews, Farrell's Ice Cream, Claim Jumper, Outback Steakhouse, or you could go on an adventure and catch the Medieval Times or Pirate's Dinner Adventure show.

A little farther away, you can cruise down Beach Boulevard to Huntington Beach to dip your toes in the Pacific Ocean or go shopping at South Coast Plaza in Costa Mesa (the largest shopping mall in Orange County).

Orange County LSA looks forward to seeing you in February!



JOSEPH JONES is a licensed Private Investigator and the Vice President of Bosco Legal Services, Inc. Joseph is a Certified Social Media Intelligence Expert, has degrees in Social & Behavior Sciences and Psychology, and holds multiple certifications in Open Source and Cyber Intelligence. He is a court recognized expert and has received specialized training from the military, various law enforcement agencies, and the nation's top private intelligence firms. When he's not tracking down bad guys or helping law firms and insurance companies uncover the truth, he enjoys spending time with his beautiful wife and 4 active children.

Social Media Investigations: Don't Miss the Boat

BY JOSEPH JONES - SUBMITTED BY SAN GABRIEL VALLEY LSA



To begin, I will provide you with a few definitions and explanations. We refer to internet/cyber investigations as Social Media Investigations (SMI). In reality, we are talking about using Open Source Intelligence (OSINT), which involves searching on both the surface web and the deep web; in addition to searching all of the well-known Social Media (SM) platforms (Facebook, YouTube, Instagram, etc.) as well as more obscure forms of SM such as blogs, chat forums, etc.

WHY SMI

The internet has become so pervasive in our society that it has changed the way we do almost everything. As of mid-2017, Facebook had approximately 2.1 billion monthly users, Instagram had approximately 800 million monthly users, and Twitter had approximately 330 million monthly users. Those are just 3 of the top SM platforms, and that doesn't take into account LinkedIn, Pinterest, Snapchat, Flickr, YouTube, Reddit, and an endless list of other SM platforms that people are using. With SM usage this great, chances are high that the parties involved in your case are on SM. And even if they aren't on SM, someone close to them most likely is, which means that photos and other information about a subject may still be available online, even if they don't personally have any SM accounts.

This is relevant because often the information legal professionals need to make informed decisions is available on SM. Examples of information commonly posted online includes where people are going, what they are doing, family/romantic relationships, employment information, political views, etc. Whether you're dealing with a business dispute, personal injury, wrongful termination, malpractice, or just about any other type of legal case, it is likely that there is someone putting information on SM that will help you get a better understanding of the facts and circumstances surrounding the case and the players.

LOCATING CONTENT

The problem with a Google search is that Google gives you everything it can regarding your search terms, and will return several hundred thousand (or more) results for most searches. Knowing how to cut through the garbage and find

exactly what you're looking for is an important tool when conducting a SMI. While there are many ways to go about this, an efficient way to narrow your search and pinpoint useful information is to utilize Boolean search logic (similar to what you use when conducting legal research).

Depending on the platform, SM can have a similar problem because people often use aliases when setting up their profiles, so it can be difficult using standard search methods to locate accounts. If you're having a hard time locating your subject's account, try using their nickname, or locating an account for a known friend or relative, and then backtrack your way to their account. If you keep running into roadblocks due to privacy settings on someone's account, keep in mind that they have no control of the privacy settings for content posted on their friend's pages or photos. While the process of finding this type of information is too complicated (and proprietary) to outline here, keep in mind that just because someone sets their SM accounts to private doesn't mean that a significant amount of information about them can't legally be obtained online.

USE AS EVIDENCE

If there's one thing that you should take away from this article, it should be that anything obtained via a SMI is evidence and should be treated as such. Think in terms of establishing foundation, authentication, and chain of custody. To establish foundation, the person collecting the information should be tracking when and how they found the content, and it should be someone who would be able to testify if need be. To authenticate, the content needs to be forensically preserved and the metadata for the content, whether it be a webpage or a SM post, needs to be extracted. Metadata is the HTML code behind the information. While

there are a variety of pieces of information that can be extracted, the most important is the MD5 or SHA Hash value, which is essentially a digital fingerprint.

*Please note that a screen print from Facebook should NOT BE ALLOWED AS EVIDENCE. Though some are still getting away with this, screen prints can be picked apart very quickly if challenged.

LEGAL ISSUES

In some respects, the world of SMIs is somewhat like the Wild West, in that there is much yet that hasn't been explored, or maybe it has been explored but is not yet widely known. That being said, there is quite a bit of information that is out there, and we have done a significant amount of research to compile case law and case summaries for cases relevant to SMI.

In addition to the authentication issues outlined already, the courts have almost universally found that anything posted to SM, regardless of the privacy settings, is fair game and that people do not have an expectation of privacy once they put information online. Several bar associations have published opinions that sending a "friend request" to a litigant represented by an attorney constitutes ex-parte communication; however, it is of interest to note that to

date no cases have been found where evidence has been excluded when obtained through such a friend request.

Finally, it is important to understand that all SM platforms and most web services abide by the Stored Communications Act (SCA) which basically limits what they can provide in response to a subpoena. This information is limited to client's name, address, IP address, length of service, and telephone number. Regardless of how hard you try, they won't turn over any photos, posts, or any actual content from the account.

CONCLUSION

SMIs are no longer an up and coming source of information for legal cases; they're here and they're thriving. Some legal publications have gone as far as to say that if you're not doing SMIs on your cases, you could be committing malpractice. And although there could be debate about that statement, there is no question it's a valuable tool for almost any case type.

For more information on this subject you can utilize the following resources:

<https://www.boscolegal.org/social-media-investigations-the-facts/>

<https://www.boscolegal.org>

case-law-relevant-social-media-investigations/

LS

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CCLS QUIZ:

REASONING & ETHICS

ANSWER "TRUE" OR "FALSE" FOR EACH STATEMENT BELOW.

1. AN ATTORNEY IS LEGALLY RESPONSIBLE FOR THE WORK PRODUCT OF ALL MEMBERS OF HIS STAFF.
2. FEE AGREEMENTS ARE REQUIRED FOR ALL REPRESENTATIONS, AND MUST BE IN WRITING.
3. ATTORNEYS MAY COLLECT CONTINGENT FEES IN ALL TYPES OF CASE AND REPRESENTATIONS.
4. STAFF IN A LAW OFFICE ARE HELD TO THE SAME STANDARDS OF CONFIDENTIALITY AS ATTORNEYS.
5. AN ATTORNEY HAS NO DUTY TO TURN OVER A CLIENT'S FILES UNTIL ALL FEES ARE PAID IN FULL.
6. IT IS ILLEGAL FOR A NOTARY TO USE "NOTARIO PUBLICO" WHEN ADVERTISING THEIR SERVICES.
7. ATTORNEYS MAY NEVER BREAK THE ATTORNEY-CLIENT PRIVILEGE.
8. SETTING LEGAL FEES IS CONSIDERED THE "PRACTICE OF LAW."
9. A NOTARY MAY NEVER LEAVE THEIR JOURNAL IN THE CARE OF ANOTHER NOTARY.
10. IF A NOTARY PERSONALLY KNOWS THE SIGNER, THEY MAY OBTAIN THE SIGNER'S SIGNATURE AND ID FOR THEIR JOURNAL WITHIN 24 HOURS AFTER THE NOTARIAL ACT IS COMPLETED.

CCLS QUIZ ANSWERS ON PAGE 16



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DAVID C. PETERSON, ESQ. was La Review Editor-in Chief; He has been an attorney for more than 41 years. He was a litigator for 20 years and has been a full-time mediator for more than 21 years. Mr. Peterson obtained his Master's Degree and then LLM Degree (Mediation) from Pepperdine's Straus Institute. He is a Professor at Pepperdine Law School's Straus Institute for Dispute Resolution, teaching "Mediation Theory & Practice (since 2007 - Adj.) He has the highest rate of settlements as documented by statistics compiled by the Santa Barbara and San Luis Obispo Superior Court ADR Programs.

Emotional Intelligence (EQ) and Managing Emotions - The Key to Greater Success and Satisfaction

BY DAVID C. PETERSON – SUBMITTED BY SANTA BARBARA LPA

Editor's Note: All of us at Santa Barbara Lawyer are deeply saddened by the news that David Peterson passed away on October 2, 2017. So many of us relied on David's skills to resolve our clients' most intractable problems. More importantly, we remember his kindness and his ability to emotionally connect on such a profound level with all who came in contact with him. David submitted the attached article to the Magazine shortly before his passing. The subject matter could not be more appropriate. -cb-

Dramatic social shifts occur periodically. One is taking place now. The Harvard Business School refers to it as "(o)ne of the most influential business ideas of the decade." The following quote appeared in the July, 2005, American Bar Association Journal: "Research over the last decade has conclusively demonstrated that emotional intelligence predicts success more than any other single factor"

Success in our context is to thrive as a lawyer, doing that which is rewarding and satisfies purposes higher than monetary gain and ego satisfaction. After all, these alone are shallow bins from which to get complete satisfaction from our work.

Some of the important qualities of EQ are: 1) The ability to Empathize; 2) Self Awareness; 3) Social Awareness; 4) Positive Thinking and Hope; 5) "Emotional Self Regulation."

Thankfully, it has been discovered through research that these qualities can be learned and mastered (unless you're psychopathic). As it becomes more ingrained in society, the results are impressive. Companies embracing it have excelled. Where government leaders practice it, success unfolds.

To be effective we must master ourselves and have the ability to empathize with those with whom we deal. This includes clients, opposing attorneys, witnesses, judicial officers, our staff, the judge or jury, and so on. This does not mean agreement or sympathy; it means the ability to see



things the way the other person does; to place oneself in the shoes of another and see things from their perspective. You can love or despise a person and still empathize with them. If you do, you can deal with them meaningfully and effectively. If you don't, you'll likely fail to achieve all your objectives.

The modern view of integrity includes the qualities of EQ. In his book, Integrity, Dr. Henry Cloud observes that:

There is no shortage of talented, brainy people who are very, very good at what they do and are able to work the system and schmooze other people to get things done. There are zillions of them, and we all see them every day. (p.6)

There is no integrity in this. Nor is impeccable honesty sufficient. There are "many honest, ethical people of 'integrity' who were not making it in some way. * * * (T)he reality is that their 'person-hood' was still preventing their talents and brains from accomplishing all that was in their potential." (p.9)

For those seeking to improve their integrity, they find it comes from:

- Empathy, "...the ability to enter into another person's experience and connect with it in such a way that you actually experience to some degree what the other person is experiencing ... at least for a moment" (pp 9 & 58)
- Gaining complete trust of others by connecting authentically with them.
- Seeing all of the realities right in front of them, and being in touch with these realities.
- Effectively dealing with problem people, negative situations, obstacles, failures, setbacks, and losses; realizing that "life is largely about solving problems." (p.172)
- Transcending their own interests and giving themselves to larger purposes, thus becoming part of a larger mission.
- Resolving conflicts by seeing and working with the truth from the other side and integrating it into one's own truth, finding a solution that transcends either polarity, (p.133) "going hard on the issue and soft on the person." (p.192)
- Actually producing the outcomes that their abilities would allow them to accomplish.

Attorneys respected for their work and ideals appear to share the following EQ qualities:

- They empathize with their clients and those around them. Again, this is not always sympathy or agreement. It is simply the ability to recognize what factors are driving the thoughts and actions of the client and others they deal with.
- They are genuine and connect in a meaningful way with others with whom they deal or seek to influence. They don't seek to dominate by aggression. They are dignified but not aloof.
- They are honest and show integrity. By doing so others respect them, even their opponents in most cases.
- Rather than automatically imposing their own agenda on everyone, they patiently and carefully survey the situation and study the individuals they are engaged with.
- They are not impulsive or rude. Instead, they respond appropriately and with purpose, showing respect to those around them, even in the face of attack.
- As a result, the attorney possessing emotional intelligence is in control of their own emotions and actions. They are realistic and accept those things they cannot control but carefully take action where their control or influence can make a difference. Time and emotion are not wasted with tantrums, outbursts or other negative behavior.

- Their mental and other resources are devoted to positive thoughts and action. Their minds are not cluttered with negativity and unproductive thoughts. Where things go wrong, these attorneys see it more as an opportunity to face and get through the circumstance with dignity and grace. They don't make excuses or seek to pass out blame.
- They realistically assess the circumstance and calmly take appropriate action. They follow the course described in Ben Stein's book, *How Successful People Win*. He calls it "bunkhouse logic." When a cowboy finds that a well on his trail has run dry, he doesn't sulk, go into a rage or seek to assess blame. He sees the circumstance as just a good argument to move on to another water source.

Attorneys and others with EQ usually stand out in their circles. They are comfortable to be around. Their clients trust them as do their opponents and judicial officers. This is because this attorney takes into account the situation and feelings of everyone around him or her. They react and communicate in a manner dictated by the results of their ability to accurately assess the perspectives, feelings and perceptions of others within their sphere of influence.

Jerry Spence (*How to Argue and Win Every Time*) describes and explains the aspects of emotional intelligence for lawyers better than anyone. He recounts his mistakes early in his practice where he failed to employ this quality. After a trial where he had taken a witness apart in blistering cross-examination, a juror asked Spence, "Why did you make us hate you so much." He had forgotten to take into account the potential reaction of the jury to the manner in which he presented himself. He had not empathized with the jury.

In another example where he used EQ, Spence describes his approach when filing a brief. He pictures the judge and what it must be like to be that judge. He thinks of how the judge must want to throw most briefs at the wall because they have to read so many lengthy, boring, predictable, bombastic, and unenlightening briefs. On this topic, Justice Wickson Woolpert once told me as I was preparing an appellate brief: "Dave, make it interesting and short."

Abraham Lincoln displayed this quality in his statement that, when he would be facing a man to influence him, he spent two-thirds of his time thinking about what the other would say and one-third of the time thinking of what he would say.

Complete and accurate listening is crucial. In the book *Making Smart Decisions* (Harvard Business School Press), the authors point out the "filters" of our mind that

Continued on page 16

compel us to tune out negative information or information disagreeable to us. When we do that we will ultimately fail. Leadership experts point to this as the single worst trait of leaders who end up getting their company or the country in trouble. The company, Compaq, suffered a huge downturn due to its leaders' failure to listen to warnings regarding the inroads being made by Gateway and Dell.

It takes patience to listen accurately, and an honest effort. Having a right frame of mind is necessary. Failure to do it leads to mediocrity or worse.

Every author discussing the subject of EQ or effectiveness emphasizes the need to be genuine, not phony. Even the ultimate salesman, Zig Zigler (*Secrets of Closing the Sale*), said you can't have success without being genuine. Those who are unable to be genuine have little hope of grasping, developing and using the concepts of emotional intelligence.

Spence devotes another section of his book on this topic: "The Incredible Power of Credibility." He says, "The first trick of the winning argument is the trick of abandoning trickery." Those who engage in "trickery" are eventually exposed for who they are. Being "straight up" and genuine gets us further in the long run.

Emotional intelligence also requires that we avoid acting upon our primitive instincts. Our first instincts are usually contraindicated when it comes to getting the results we and our clients desire. If we are attacked our first reaction, if not checked, is to counter-attack. This is most unproductive. They say that a part of our brain's frontal lobe acts as a "damper on our instincts to go ballistic." Some of us need to go into the shop to get ours fixed. An emotional reaction or outburst usually escalates an already bad situation and produces no favorable result. Anger (or intoxication for that matter) has led to some of the poorest decisions humans have made. We usually do it out of fear or self-protection, motives that cause us to wander from our true objective which we're unlikely to reach by way of knee jerking emotional reactions.

Another trait contrary to emotional intelligence was exposed by George Carlin who observed as follows: "Did you ever notice that when you're on the freeway those who are going slower than you are idiots and those going faster are maniacs?" The thought that we are the center of the universe, are all knowing and have all the right answers or keys to life, persists in most of us. When our minds are closed to others and their ideas our vision is stifled. We

become myopic, less effective and unproductive. We lose the ability to be creative in finding solutions for our clients. It's a flaw in integrity as Dr. Cloud sees it:

(It) is the worst sickness of all: the preservation of the 'good self.' It is the character component of narcissism, the search for the 'ideal self,' or the wish to see oneself as 'all good' or flawless or perfect. It is one of the sickest traits we can have.

One way to test ourselves on these qualities is to look at the wake we are leaving behind. Like a boat, we move through the waters of our experience. Two trails are formed, one to the right and another to the left. One wake represents the tasks we performed, the other our people relationships. Are these trails mostly positive or negative? As Dr. Henry Cloud puts it: "(w)e can tell a lot about (a) person from the nature of (their) wake."

The more all of us strive to employ the components of emotional intelligence and integrity the more we will excel and be satisfied with what we do. It appears to be a life-long process from which we never graduate. As we improve, however, others around us are lifted and we lift the image of our profession as well. We also find greater success and satisfaction with our lives.

This article was reprinted with permission from the Santa Barbara County Bar Association (SBCBA). It was originally published in the November 2017 Santa Barbara Lawyer magazine, a publication of the SBCBA. You can view the original online here: <https://sblaw.org/wp-content/uploads/2017/01/November-2017-1.pdf>

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ANSWERS FROM QUIZ ON PAGE 12

CCLS QUIZ: ANSWER KEY

- | | | | |
|----|-------|-----|-------|
| 1. | TRUE | 6. | TRUE |
| 2. | FALSE | 7. | FALSE |
| 3. | FALSE | 8. | TRUE |
| 4. | TRUE | 9. | TRUE |
| 5. | FALSE | 10. | FALSE |

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CATHERINE RAYE-WONG, LL.M (TAX), a former legal secretary and paralegal, is a partner at Aaron, Riechert, Carpol and Riffle APC in Redwood City, CA. She is a longtime member of San Mateo County Legal Professionals' Association, a prior research attorney for San Mateo County Superior Court and dedicates her practice to only trusts and estates, including conservatorship and guardianship law. A San Mateo County native, she is a graduate of Notre Dame de Namur University, San Francisco Law School and Golden Gate University School of Law. For many years pets have brought her comfort and joy, so she never forgets them when guiding clients in their estate planning.

When Estate Planning, Don't Forget the Pets

BY CATHERINE RAYE-WONG, LL.M (TAX) - SUBMITTED BY SAN MATEO CO. LPA

Pets are so important to clients, and many are surprised that pets are considered tangible personal property. Therefore, pets are estate assets. They cannot be heirs or beneficiaries, cannot inherit or own property, and, because they are not self-sufficient, they must be cared for if their owner becomes incapacitated or dies. When considering estate planning, it is required to note that pets require both personal attention and financial resources. The following discussion includes important documents to prepare for incapacity and death, and each should contain provisions regarding pet care.



OWNER'S INCAPACITY:

The healthcare power of attorney or healthcare directive should include specific language that the agent should consider placement of the pet with the owner if a move is needed due to infirmity or illness. Many care homes and assisted living communities allow pets, though they often have limits as to number and size.

A financial power of attorney needs to include language directing use of owner's funds for pet care.

If a client wants a living trust, it should contain specific language indicating pets are to be supported with financial resources and name a temporary care guardian or new owner (with a gift of funds) if the pet can no longer live with the owner.

DEATH OF OWNER:

If no provisions are made in the owner's will or living trust, pets will pass the same as tangible personal property such as furniture, jewelry, cars, and other personal effects. In some estates this will work fine, such as a case where a pet-loving family is sure to care for beloved pets. Many times, such lack of planning is inadequate.

Designating a person to inherit the pet is common. This provision can be included in a will or living trust. However, if the gift of the pet is made to a specific person, it is best to

leave a sum of money to assist with pet care needs. Again, this should only be the solution if one is secure knowing the designated person will care for the pet properly for the pet's remaining life.

A pet trust can be established under California Probate Code Section 15212. Name a trustee, an alternate trustee, an amount of money or source of assets to fund the trust, specify the pet(s) (only those alive at the owner's death will qualify), and indicate how the trustee can spend funds for pet care, such as food, veterinary care, guardian care, etc. Important decisions include the trustee and successor trustee(s), as well as who will inherit any remainder after the pet dies. Most often the trustee and remainder beneficiary should not be the same due to conflict of interests. Keep in mind that the law provides for any person or animal rights organization who suspects the pet trust is not being properly managed for the pet's benefit has standing to sue to enforce the trust.

A person/pet trust can name a person (caretaker) the beneficiary of the trust, and they also receive the pet. Appointing an independent trustee is best to make distributions to the beneficiary as long as they care for the pet. Enforcement of this trust is more likely since it has a human beneficiary personally interested in keeping the trust going. Again, important decisions are the trustee, naming a successor trustee, as well as the caretaker and any successor caretaker, as well as the remainder beneficiary.

An animal organization can be left the pet at an owner's death. This provision can be indicated in a will or living trust. Often the organization's programs request pre-enrollment of the pet and some level of donation. Not all pets may qualify for each organization, so it is important to research the specific requirements of the desired organization.

TAX ISSUES:

If a pet trust is established, income taxes will be paid at the highest tax rate for trusts. If a human beneficiary is named, income can be passed out and paid at the beneficiary's, often lower, income tax rate. Distributions for pets are not deductible.

Estate taxes needs to be considered as pets sometimes are valuable. Appraisals can be needed for these types of pets, as their value is included in the estate for estate tax purposes. Pet trusts are not exempt from federal estate tax even though any remainder may pass to charity when the pet dies.

FUNDING ISSUES:

In determining how much money to set aside for a pet's future care, it is important to consider administrative costs (trustee fees, accounting and legal fees) and taxes, in addition to anticipated care costs, such as food, accessories, medication, veterinary care, training or exercise care, etc.

CONCLUSION:

It is important to remember that clients are closely attached to their pets, so this area of planning requires sensitivity and thorough consideration of the issues that may arise in the event of the owner's incapacity or death. Clients should be provided a questionnaire that can allow them to leave specific information regarding their pets to assist in the proper care of beloved pets. A well thought out protective estate plan for pets will leave a client satisfied that all issues have been considered when and if incapacity or death arrives.

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Dates to Remember in 2018

- | | |
|-----------------------------|---|
| February 16, 2018 | Registration deadline for Legal Specialization Sections Seminars at Third Quarterly Conference |
| February 17, 2018 | Last day to submit CCLS Exam Application with late fee to the CCLS Certifying Board for March 17, 2018 exam |
| February 21, 2018 | Registration deadline for CCLS Workshop at Third Quarterly Conference |
| February 23-25, 2018 | LSI Third Quarterly Conference
Knott's Berry Farm Hotel, Buena Park, CA
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| March 1, 2018 | Last day to submit articles for May 2018 issue of The Legal Secretary |
| March 14, 2018 | Overview of California State Court Discovery Online Class begins |
| March 17, 2018 | CCLS Exam |
| April 18, 2018 | LSI Annual Conference registration due |
| May 17-20, 2018 | LSI Annual Conference
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CAROL E. ROMO currently serves as Vice President and Membership Committee Chair of the San Francisco Legal Professionals Association (SFLPA). She has been a board member for five of her six years of membership. Carol works at Crowell & Moring LLP in San Francisco where she supports two partners, two Of Counsel, and two Associates simultaneously. She has been a legal secretary for more than fifteen years now and enjoys her chosen profession in the private law firm immensely. Carol has also served on an LSI Annual Conference Committee. She writes articles such as this one regularly for The Hearsay, SFLPA's monthly bulletin, and enjoys making new acquaintances through her involvement with SFLPA and LSI.

How to Juggle Five or More Attorneys Without Dropping One on Your Head

BY CAROL E. ROMO – SUBMITTED BY SAN FRANCISCO LPA

The role of the legal secretary has changed greatly over the past two decades. Many law firms have gone so far as to change our title to *Client Services Secretary* or something along those lines. The reason for this comes from the advancement of technology. And most of us who have been legal secretaries for a while, know this all too well.

Today most attorneys in the private law firm are computer savvy. They either grew up and went to school with a keyboard at their fingertips, or they learned how to use a computer effectively to keep up with their subordinates. I recall my first job in a professional office working as an executive secretary. One day, my boss, the CEO, called me into his office and asked me to show him how to send an email. Part of the procedure at that time involved pressing the F1 key. When I told him to do that, he eagerly plucked the F key followed by the number 1 key. (We've come a long way in a relatively short period of time.)

Today, dictaphones and deciphering an attorney's handwriting on multiple pages of legal yellow notepads are definitely things of the past. We all know that email has replaced facsimiles and quality stock letterhead; we hardly ever run out of printed envelopes any more. And, while being able to scan and save documents is supposed to save paper, this worked out to be the opposite because now everyone prints their own hard copies of what used to be found in the law library, which incidentally has all but disappeared from today's law firm. But at least all that filed paper that used to be filed in the law firm records department is now saved on computer archives. Gone are the days of pleading and discovery indices. Now it's all about naming the documents in a standardized style when saving them to the firm's data base.



So, thanks to all of the advancement in the technical business world, we legal secretaries find ourselves being assigned to support additional attorneys as fellow legal secretaries leave law firms. Look around most any law firm that has yet to undergo office renovation, and you will see empty workstations that used to house legal secretaries who were located within earshot of the one or two attorneys they supported. Today, legal secretaries are commonly assigned to five or six attorneys and they are never all within earshot or eyesight. With attorneys typing their own pleadings and discovery, many e-filing the documents themselves (why? I think it's because they know they have until midnight to do so), this leaves more time for legal secretaries to handle administrative tasks like preparing expense reports and inputting attorney billing time. I find that most associates prefer to be self-supportive because they don't see any benefit from having a secretary do what they can do themselves. Still, most of us legal secretaries agree that the best thing an associate can do when it comes to preparing a pleading, is to write the text and allow us to do the formatting.

So, I have come up with some tips on mastering the new challenge of supporting five or more attorneys at a time in a way that is useful to the attorney and keeps our role fulfilling. Since communication is key to anything and because most of our attorneys are not within earshot or eyesight of us anymore, I start with the following tips on emailing.

1. Drowning in Email One Liners

A very distinct problem we have when we are not in earshot of those we support is the huge increase in “one-liner” small email communications. What used to be communicated in passing, like “Are you going to be in the office tomorrow?” or “Did Frank see you? He was looking for you.” etc., becomes an email volleyball match that takes a great deal of your time opening, reading and responding to. Every time your task at hand is interrupted by these little emails, it takes several minutes to get back to the place you were. I used to work with a partner that would write me an email to get him something even though I was just outside his door and no one else was in the vicinity. Yes, it’s true. Email can actually cost you hundreds of hours of unnecessary work where a telephone or personal communication could easily be had for less.

So, the best way to thwart these email one-liners is by picking up the phone and responding directly to the email inquiry. Trust me, this will not only save you time otherwise spent playing email volleyball but it will also give your attorneys a little training by example. To make this simple, first put all of your attorneys’ extensions on a one button speed-dial at your phone. Also, before you pick up the phone in reply to an email, take a second or two to think about any other questions or comments you may have concerning the subject matter.

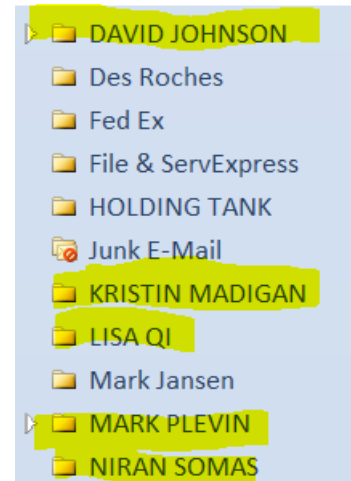
2. Putting Your Hands On That Email Now!

How often do you hear “it was in that email I sent you”? I always want to reply sarcastically with “Well, lucky for me I don’t get emails from the other five attorneys I support.” Of course, I never say that out loud, but the bubble looms large over my head as it would in a cartoon. One of the best ways to keep on top of your incoming email when you support five or more attorneys is to create a folder with each attorneys’ name you support in your navigation pane (in Outlook, it’s the column to the left of your email inbox.) (See Example 1.) Then, as you get emails from your assigned attorneys you can move them to their named folders and if not urgent, answer them when it is more convenient. This prevents you from losing your place when you are in the middle of something with a deadline looming. But even more importantly, this will

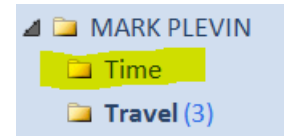
allow you to find an email more readily with or without using search.

Sometimes, I use the Rules feature in Outlook to keep my inbox free of clutter. For example, I have an attorney who sends me his billing time by email every day. He always uses the words “Billing Time” in the subject line. So I created a rule that automatically puts incoming emails from that attorney, with the words “Billing Time” in the subject line, in a sub-folder I created under that attorney’s named folder called “Time”. (See Example 2.) Later, when I have the time, I go to that sub-folder and input the billing time. I also leave all his emailed billing time there in case he ever questions what he wrote, etc. So, this practice described above, takes some of the clutter out of my inbox and makes it easy for me to put my finger on any particular email.

Example 1:



Example 2:



3. Organize, Organize, Organize

Whether you work in a variety of practice areas or just one, you will always be more competent at doing your job by spending just a little time staying organized. Case Binders, like case lists, fall into this category. And the saying: “more knowledge equals more power” applies here as I hope to help you see.

Color Coding – This is a way to identify something you will need to find, quickly and effortlessly. For example, I use red colored folders for anything that needs to be signed by an attorney. That way the attorneys know when they see a red folder anywhere in their office, it has something in it that they need to sign. It also helps me to find the folder in their office for those attorneys that keep a messy desk/office. I also use yellow folders for timesheets for the same reasons, and blue folders for incoming U.S. Mail (after I

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have scanned those documents and saved them to the firm doc-management system). Some secretaries I know will designate a particular folder color to each attorney they support to keep track of paperwork by attorney rather than the contents. Either way, using color folders can be helpful when passing paper between you your attorneys and where the paper needs to end up at.

Calendaring - Outlook email program also allows you to color code categories for the purpose of keeping track of different appointments for any one calendar. For example, most attorneys have at least a handful of active cases with related appointments, deadlines, hearing dates, depositions, etc. I found it useful when working with attorneys that relied on me for keeping their calendars, to use the color-category feature in Outlook to identify each appointment by an assigned color for each matter. Then, you can see all the calendar activity by matter which is useful for both the attorney and their secretary.

Case Binders – If you don't already keep a case binder of the attorneys you support at your desk, you should start. Here's why.

Attorneys often forget that you support five other attorneys who rely on you to keep track of things or at least know the matters on their case lists. But rather than continually reminding them of this fact (and appearing to be negative), I manage to stay on top of each case by keeping a case binder for each attorney with tabs labeled with their active cases. Or you can have one binder with a tab for each attorney by name. Either way, using case binders will make it easier for you by having hardcopies of the following behind each case tab:

- hard copies of the original complaint for caption purposes (and to read through if such an interest should come to you and you have time . . .)
- a copy of the case management schedule that is usually served with the complaint;
- a hard copy of your own (or the firm's) caption template for each matter;
- a printout of the current master calendar;
- current service lists including copies of any agreements that may be in place for service by email;
- a copy of the pertinent local rules. Standing orders, E-filing instructions for this particular court, etc.; and
- any hand written notes containing information like the court clerk's name and phone numbers, etc. Basically, you would want to jot down anything that may save you time having to look up in the future. It's actually faster than continually using the internet each time for the same information.

Three-hole binders make it easy to update and you should color code the binder's spine inserts and cover sheets so that you can identify which binder to grab when you are reaching for one on your desk.

Desk Reference Binder – There are many reference books out there – both in electronic format or hard copy – that help us do things efficiently. The LSI Desk Reference manuals are a good example. But if you want to save yourself a great deal of time by not making the same mistakes or by having to look the same information up more than the first time, a Desk Reference Binder is the best tool you can use to achieve this with. This is a binder you keep for yourself that you constantly update with material and information that you use constantly in your role as a legal secretary. The binder should have tabs labeled with some or more of the following subjects:

CAM Numbers – (or whatever the term your firm uses for client billing numbers). I keep my CAM Lists by attorney. A great way of finding CAM numbers for the attorneys in your workplace is by running a report in the client billing program at your firm by attorney name and a past date range of about a year. This will give you an accurate list of cases any of the attorneys in your firm are actively working on which you can also use to generate Case Lists by Attorney.

Passwords – This tab marks the place where you keep all the login and passwords assigned to your attorneys for electronic filing, and any other password driven programs you may be privy to. The ideal law firm keeps a master list of all the login/passwords for each attorney so that anyone can assist any attorney with an electronic filing. While passwords and logins should be kept secure, most attorneys rely on their secretaries to keep track of their logins and passwords.

Attorney Profile Sheets – This tab contains credit card numbers, mileage plus and advantage program numbers, membership numbers for rental cars, airlines, etc. for your assigned attorneys. This should also include their home addresses, their spouse names, cell phone numbers and any other personal information that you use to assist your attorneys such as enrolling them in seminars, paying state bar fees, etc.

MCLE Credits – This tab should contain completion certificates and a running report printout of the MCLE credit history for each of your attorneys. I choose to keep this material in a redwell by attorney name rather than my desk binder, but either way it's a must if you are responsible for keeping accurate MCLE credits for your assigned attorneys.

Phones – This tab should contain any written instructions on using your phone that you can get your hands on. Highlight the features you will use the most like transferring callers directly to voice mail or setting up speed dial buttons for vendors such as CourtCall, messenger services, etc. This tab should also contain standard out of office telephone greetings that you can use consistently every time you are going to be out of the office.

Conference Calls – Many firms have third party vendors that provide conference call-in numbers by attorney, often containing dial in information and host passcodes, etc. Detailed instructions for setting up conference calls both in-house and outside the office should be kept under this tab. Don't wait until you are asked for this information either. Ask your administrator or your neighbor legal secretary about this ahead of time then keep accurate records about conference calling.

Firm Policy – Every law firm small or large has a policy manual. Keep a copy in your desk reference binder to refer to it when preparing expense reports or figuring how to expense an item, get a check request out, etc. Again, I use a highlighter to mark the items I will need to refer to the most in my capacity as a secretary.

Opening New Client Matters – Don't wait until you are asked to do this the first time before reading up on it and learning how. Most law firms have programs dedicated to opening up a new matter. Keep your notes and examples of how to fill out new matter request forms

here for opening new matters with minimum mistakes. (Note: Instructions on running Conflict Checks should be kept here as well.)

I'm sure there are a variety of other tabs you might find useful dedicated to your specific role in the office and I think you get the picture of the purpose of keeping a desk reference binder handy – to save you time and not to wait until it becomes an emergency for you to act on any of the administrative functions you will use to assist your attorneys on a daily basis.

In Conclusion

Attorneys will always need some amount of secretarial assistance. Few firms still teach their newbie associates how to use their assigned secretaries. There seems to be a trend in moving away from mentorship programs in today's law firm. But the fact is that no one attorney needs a secretary all to him or herself these days, unless the attorney is in the top 1% of the upper tier of the legal industry. Many secretaries of my generation had great difficulty accepting the changes caused by the sudden surge in advanced office technology. To those colleagues of mine I say, "Nothing ever stays the same. The best thing you can do for you and those you support in the workplace is to take control of the changes we face every day and use the technology we have at our fingertips to navigate the future of our profession to a whole new level of enhanced attorney support."

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Helpful Websites

Supreme Court of the United States

<http://www.supremecourt.gov>

Office of the Attorney General

www.ag.ca.gov

California Courts

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

California Association of Legal Support Professionals

www.calspro.org

California Codes

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

California State Bar

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

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



California Certified Legal Secretary
A Program of LSI®



APPLICATION TO TAKE CCLS® EXAM

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

(Select one) ☐ **Northern California** ☐ **Saturday, March 17, 2018**
☐ **Southern California** ☐ **Saturday, September 15, 2018**

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

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

Personal Information

Name: _____

Mailing Address: _____

Last 4 digits of SSN: _____ Email: _____

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

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

Name of Local LSI Association: _____

Employment Information

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

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

Summary of Duties: _____

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

Date: _____

Applicant Signature _____

*Fees subject to change without notice.

Rev. February 2017



MARCI FRAZIER is a Chicago native who migrated to California in April 2015. She is a Legal Secretary at the firm Downey Brand LLP in Sacramento. She reached her 30-year milestone as a legal professional in 2017. Besides enjoying the indescribable pleasure of preparing pleadings and other legal documents for a living, Marci enjoys reading and writing poetry, and is the broker/owner of a real estate company she founded in 2002.

SCBA's KIDS LAW DAY – Kicking Class and Taking Names

BY MARCI FRAZIER - SUBMITTED BY SACRAMENTO LSA

It was the mid-1980's in Chicago, Illinois, and Career Week at my elementary school. A project for my 8th grade class was to attend the workplace of a relative or friend and write a report about the experience. I reached out to my aunt, who was a legal secretary at Jones Day, a law firm in downtown Chicago. She was happy to have me tag along as I observed her during a typical day. At the time, all I knew was how great it would be not to have to go to school for a whole day. What I didn't know was how much that experience would chart the course of my professional life.

I spent an entire work day with my aunt. I was mesmerized as I watched her fingers flying at a dizzying speed over her Selectric typewriter. She showed me how to make copy after copy of documents on the huge floor to ceiling Xerox copier that seemed to swallow up papers by the ream full. She taught me how to properly file client documents in the file drawers that magically appeared and disappeared into the walls. During lunch, I walked into the massive Federal courthouse for the first time to observe where all legal excitement took place. By the end of that day, I knew without a doubt that my career of choice would be Legal Secretary. On that very day, I started planning my career.

That experience taught me how powerful adult influence can be on the minds of children. Trying to decide what to be when you grow up has a lot to do with what you are exposed to at the time. As professionals, we can have an immense impact on the impressionable minds of children as they try to chart their way through the maze of career choices.

This is why programs such as SCBA's Kids Law Day are so vital to the community. Sponsored by the Sacramento County Bar Association in collaboration with Sacramento Legal Secretaries Association, Kids Law Day was held during a four-week period in the months of October and November. It is an interactive experience designed to expose children at the elementary school level to careers in the legal profession. An attorney is paired with a paralegal or legal secretary, and they spend an hour or so with kids in the classroom, speaking about their experiences in the legal field, answering questions and engaging with the children.

I was honored to participate in two of the scheduled Kids Law Day programs. The first day was Friday, October 20th, where we attended Martin Luther King, Jr. K-8 in

Sacramento. I was paired up with attorney Gary Lindsey, Jr., a senior deputy city attorney for the City of Sacramento, and we spoke with a classroom of 5th graders about our legal careers. The second Kids Law Day took place on Friday, October 27, where we attended Natomas Pacific Pathways Prep School in Sacramento. On that day, I was paired up with attorney Shanae Buffington an attorney with the California Employment Development Department, and we spoke with a classroom of eager 6th graders.

The children had lots of questions that ranged from, "Have you ever put anyone in jail?" to "Why do you like your job?" After speaking briefly about what we individually do in the legal field, we were allowed to fully engage with the children, walking around the classroom and asking them questions about their lives, what they wanted to do as adults and how to best achieve their goals.

Through our presentation, we were able to help them appreciate the value of what they are presently learning in school and how that translates into whatever their future goals are. Their aspirations ran the gamut, from professional athlete, website designer and astronaut, to brain surgeon, Supreme Court Justice and U.S. President. These kids have goals!!

Leaving the classroom after each electrifying presentation left me remembering my time all those years ago when I visited my aunt's job. Seeing how much she loved her work, how good she was at it and the fulfillment she felt from a job well done left a huge impression on my life. My hope is that the time we spent as participants in SCBA's Kids Law Day created that kind of impact on the children we visited.

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ROSE SHEEHAN landed her first legal job because she could type 85 wpm on an IBM Selectric. She knew nothing about legal procedures or that a 25-year legal secretary career lay ahead. Rose has worked as a legal secretary in Sonoma, San Francisco, Los Angeles, and San Diego Counties. Today she is a Lead Secretary at Morrison & Foerster. She manages a litigation desk and works to improve workflow and staff expertise. The San Diego Legal Secretaries Association (SDLSA) has been a treasure of training and networking opportunities for Rose. She served as Co-Chair for Educational Programs and, is currently the Membership Director for SDLSA. Rose obtained a B.A. in Political Science and her CCLS certification; she is now taking classes in Business Administration. Rose lives in El Cajon, but she loves traveling to see her children in the Bay Area and New York.

Best Practices In The Law Office

BY ROSE SHEEHAN – SUBMITTED BY SAN DIEGO LSA

On a recent day at work, when each of her four assigned attorneys had deadlines to meet, Pat the Secretary felt grateful for two things: First, the document control system followed in her department was going to pay off to get these hot documents done; and second, Pat's coworkers in her coverage cluster would be able to pitch in and help get the job done.

“At a time when gaining and keeping clients is very costly, servicing their needs well and quickly is crucial.” This quote from the “Law Technology Today” e-newsletter¹ captures the reason for being an efficient legal secretary: To give the clients the most bang for their buck and allow the attorneys to excel at lawyering instead of administrative tasks. Clients expect this from the attorneys, and secretaries can add value to the attorneys’ practice by holding themselves to the same standards.

In my 25 years (or so) of experience, whenever a work team agrees on a set of best practices, the natural outcomes are less time wasted over corrupted documents and greater mutual confidence in the team’s ability to get the job done. And what a stress reliever that is! Most mid-size to large law firms of today are founded on teamwork more than ever before. That goes for the attorneys as well as support staff. In so many practice areas—litigation, tax, intellectual property, real estate, and transactional work—attorneys put their heads together to hammer out complicated legal strategies. If electronic discovery is involved, that’s another expertise that needs a team to handle. Some large firms will pull a case team together from various offices in different time zones. The attorneys work together, but remotely. This creates a network of secretaries that will probably handle documents for the same matters.

As we all know, law office work can be very stressful. This is where procedures that encourage good time use and a calmer work atmosphere come in! In my opinion, secretaries manage documents better than attorneys and bring value to the practice by doing so if everyone is on the same page with a few simple systems for managing case documents. “When an attorney is spending time running document comparisons, tracking down versions, and making needed edits to a document versus delegating those tasks to a legal secretary, [that makes for] a bad value proposition for the firm and the client as well.”²

A good practice when creating best practices is to get input from the staff and attorneys who will use and benefit from these procedures. Every law firm will need to tailor its best practices to fit the procedures and workflow of the office. Here are a few best practices that have worked well in my experience:

BEST PRACTICES FOR DOCUMENT CONTROL:

1. For litigation matters: Create a Master Caption and Master Proof of Service for each matter. The Masters will have the caption and footer information and formatting required for that case in its particular court. Secure the editing rights to only one or two designated individuals for the case (the fewer, the better, and secretaries are safer with editing rights than attorneys!). Going forward, every document created for the matter should be based on these Master documents. For example, if a Notice of Deposition is needed, copy the Master Caption and save it as a new document and proceed. Similarly, copy the Master Proof of Service to create the proof for the documents being served.
2. For transactional matters: Create a Master Document for each matter containing title and header information that will be repeated in a set of documents. Also helpful is to create a Master Information document with key dates, corporate officers, and other information that will be referenced as the matter proceeds. Secure the editing rights to designated individuals for that matter (again—the fewer, the better). Copy the Master and save it as each new document is needed.
3. It may be wise to have a word processing specialist create Master documents. This will ensure that all the invisible formatting in the caption, title, header, footer

and title headings is done correctly with little chance of corruption.

4. Agree within the team that, during the process of working on any documents, edits will be made in the original document that is saved in the law firm's document management system (not in a random copy on someone's computer desktop). Use the firm's document management software to save new versions with helpful labels.
5. Agree on a naming convention and appropriate abbreviations for documents in the document management system. For example, which you would rather be looking for: a document called "Letter to Joe" or a document called "Client/Matter Ltr to Smith re Sett Terms"? This will save attorneys and staff tons of time locating past documents as the number of case documents grows. Even the attorneys will appreciate it next time they find their own documents more quickly!
6. Agree on how to use the fields available in the document profiling system. These fields are another tool for locating documents in a quick, reliable manner. For example, will every transactional document be profiled as an "Agreement," or will your office designate Agreements, Powers of Attorney, and other more specific categories? Will every court document be profiled as a "Pleading," or will more specific terms be used, such as "Notice," "Order," and "POS"?
7. If the office utilizes an electronic filing system, agree on a uniform method of organizing and naming scanned documents for the electronic files.

BEST PRACTICES FOR CASE MANAGEMENT:

1. Assign two secretaries to be the main and backup coordinating secretaries managing the administrative details of a matter. This does not mean the coordinating secretaries will do all the work on the matter, but they will be responsible for administrative management of the case, upon which the other team members can rely.
2. Set a departmental system of what the coordinating secretaries will manage. Some key items would be case calendaring; keeping the Master documents up to date; sending any paper files to the Records department; keeping an eye on the electronic file for the matter; maintaining a costs file incurred for the matter; and billing to the client.

BEST PRACTICES FOR DESK COVERAGE:

Depending on the size of the secretary group, set up coverage "clusters" of 3 or 4 secretaries who will always cover for each other's absences and also help with overflow work within the cluster. The clusters could be determined based on several factors, such as practice areas or simply office locations. Having coverage secretaries on the same floor as the attorneys being supported works best, when possible. Advantages to having the same cluster continuously helping each other are that camaraderie grows within the cluster as well as familiarity with the particular client/matters handled by attorneys within the group.

Agree on a system of daily communication to let everyone in the office know which support staff are in or out for the day.

Office systems like these may seem overly detailed to some, but once in place, they are not difficult to sustain and well worth the effort. The benefits of best practices begin to roll off each other. For example, uniform document and case management makes for a very smooth work transition between attorneys and secretaries working on the same case documents. And with coverage clusters pre-established, each secretary automatically knows who is covering for whom. Likewise, no attorney will be left guessing who can help with a deadline project on the day that his/her regular secretary is out sick.

The key is "buy-in." That means department leaders for the attorneys as well as the staff need to buy-in and enforce compliance. Best practices are only as good as the person in the department who is the worst at following the system. "Use these suggestions to stop wasting time on low value tasks, put tools in place to improve your common workflows, and establish routines with your secretary that maximize his or her value to you and your practice."³

It does not take long before the wisdom of these systems comes to light.

Many times, it takes a good legal secretary to initiate best practices. Good, consistent systems—best practices—makes for less document drama. Good, consistent systems keep staff and attorneys accountable. And good, consistent systems allow everyone to enjoy a smoother work day.

ENDNOTES

- 1 Spencer, Michelle, "Effectively Using Legal Secretaries in 2016," <http://www.lawtechnologytoday.org/2016/04/effective-legalsecretaries-2016> accessed 11/10/17.
- 2 Spencer, Michelle, "Are Legal Secretaries the Key to Increased Law Firm Profitability," <http://www.lawtechnologytoday.org/2016/01/legal-secretaries-michelle> accessed 11/10/17.
- 3 Ibid, endnote 1.

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VIVIAN SHREVE, CCLS has worked in the legal field, primarily in civil litigation for more than 25 years. Vivian attended the paralegal program at DeAnza College and for the last 9 years has been employed at the Palo Alto office of Wilson Sonsini Goodrich & Rosati as an Executive Assistant, where she practices in IP, Securities and Commercial Business Litigation. She joined Santa Clara County LPA in 2013, currently serving as its Continuing Education Committee Coordinator. She obtained her CCLS certification in 2014 and is also a member of the CCLS Certifying Board.

The Road to Becoming a CCLS

BY VIVIAN SHREVE, CCLS – SUBMITTED BY SANTA CLARA CO. LPA

I have been in the legal field for my whole life – literally! My step-father was a criminal defense attorney and my mother was his office manager, so I have quite literally grown up in the legal field.

I've worked in the areas of criminal law, bankruptcy, insurance defense, unlawful detainer, family law, civil litigation, patent prosecution, and ultimately IP and securities litigation, which I've been doing for the last 9 years. I've always had a good bit of confidence in my ability and my skill set. But a few years ago, I heard about something called the California Certified Legal Secretary exam. I started doing some research and thought "Shoot, I've been in this field my whole life; I should be able to do this!" Then I talked to a former secretary in my office, who happened to be a CCLS. She encouraged me to go for it and told me about the study groups. So, I started really considering it. I joined Santa Clara County LPA, admittedly so I could get the benefit of the discount on the study materials and exam. Once I got the materials and started to study, I questioned myself and thought "WHAT HAVE I GOTTEN MYSELF INTO?!" But, alas, it was too late to turn back now. You see, in all of my excitement about the exam, I told everyone at work that I was studying and that I'd be taking the exam. I was actually able to get my employer to agree to reimburse me for the materials and exam fees if I was able to pass. NO PRESSURE, right?

So, I studied. I studied flash cards at lunch time; I attended the online study group every week; I read all of the materials; I studied the Gregg Reference Manual; I had people quiz me; and I had the attorneys in my office spouting all kinds of legal terminology at me. For 12 weeks, if I had a free minute, I was doing something related to the exam.

Now here it is, EXAM DAY! To know me is to know that I am one of the world's great sleepers. I love to sleep in on Saturdays - but not this Saturday. I was up early and driving from San Jose to Burlingame so I could be sure to be there by no later than 7:30 for the 8:00 start time. After the first section was done, I called my husband and told him I'd be back up in Burlingame for the next test session because I thought there was no way I was going to pass. I finished the exam and on my drive home, really not having



any idea how I did on the exam, I felt so completely worn out, but at the same time I was somehow invigorated. I knew I had done all I could to prepare myself and I had done all I could on the exam. And not only that, but I felt that I had taken a huge step in trying to advance my career.

The next several weeks were excruciating for me. I checked my email every chance I got – morning, noon, night – waiting for the results. So finally, just before Thanksgiving, I'd been at a food sort at the local food bank, sorting apples and oranges all morning. Upon returning home and checking my email, there it was – CCLS CERTIFYING BOARD. The results were in. I started to shake and I could actually feel the blood racing through my veins. I was so excited, so nervous, so anxious. I open the email and the first word I saw was CONGRATULATIONS. I screamed! My husband and kids came running in to see what was wrong. They found me jumping all over the house screaming "I did it! I did it! I passed!" They never had any doubt. I emailed my bosses and told them. They also never had any doubt. I think I was the only person who ever had any doubts. I jumped around so much that I ended up hurting my sciatica and ended up in the emergency room.

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MICHELLE VIGIL is a Legal Secretary with the law office of Varela, Lee, Metz & Guarino LLP where she specializes in support to breach of contract construction lawyers providing a wide range of support for the firm's attorneys, paralegal and professional legal staff. She has been in the legal field since 1999, beginning as a legal secretary to a personal injury defense attorney. She has since experienced providing legal support to attorneys in a wide array of litigation practices. She has always been a studious person and has studied laws and the judicial system as well as human resource curriculums through various online study courses and attendance seminars. She is an active member of the San Francisco Legal Professionals Association (SFLPA) and once held the title of Education Chair.

Michelle is an animal rights advocate and donates annually to organizations such as the SPCA, ASPCA, WWF World Wild Life, and "Give Me Shelter" Cat Rescue.

A Legal Secretary's Perspective on Working at Different Sized Law Offices

BY MICHELLE VIGIL – SUBMITTED BY SAN FRANCISCO LPA

My purpose in writing this article is to explain from my perspective, the variances in working as a legal secretary at different sized law firms.

My very first job as a litigation legal secretary was at a small personal injury/asbestos defense law office. It was at this office that I learned everything about litigation from the inception of the lawsuit (complaint) all the way through to trial. I was trained by the partner who practiced the personal injury side of the business. The partner also recommended that I take a six to eight week course sponsored by none other than the San Francisco Legal Professionals Association, (SFLPA). The partner took it very seriously and took a special interest in how things were going at the SFLPA training seminar. While I do not recall the name of the lawyer who volunteered his time to teach this course for SFLPA, I will always be grateful for the knowledge he shared with me and other novice legal secretaries. I will also never forget the partner who invested his time and interest in my training and learning.

After working for one year with the firm, it was disbanded with each partner going their separate ways. The sterling reference from the partner who trained me landed me a job at a large well-known law firm. I thought for sure I would utilize all the knowledge I had acquired at the previous small firm, but to my surprise, it was a much different experience. While it remained important to know how to file pleadings with the courts and serve discovery in a timely manner, I found my position at the large firm to be slower-paced and in a sense, limited. For instance, each position, whether secretary, paralegal, records maintenance employee, word processor or other office staff, had very specific roles without much variation or responsibility. As a person with a lot of energy and an inquisitive mind, I felt myself longing for the hands-on variety and work of the smaller office environment that I had experienced previously.



As the years went on, I worked both as a temporary and permanent employee for different sized law offices and learned along the way to recognize the differences between the sizes and practices.

My experience working in smaller to mid-sized office environments offered me something tremendously beneficial: experience. Getting to experience many of the duties that paralegals handle and even some that junior attorneys handle, proved to be a valuable communication tool both on the job and during interviews. How better to sell oneself at an interview than to convey that you are knowledgeable and/or familiar with various types of duties and tasks. For example, I could show I knew about document review, thorough proofreading, drafting non-complex pleadings such as notices of motion, and proposed orders, filling out and being knowledgeable with numerous judicial counsel forms, as well as drafting detailed case

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THE ROAD TO BECOMING A CCLS

Continued from page 30

Since taking and passing the exam, my career has been completely different. I received a huge amount of respect from my coworkers, bosses and colleagues. I have been getting better raises and bonuses. I get to travel with my attorneys for trial, which I love doing. I have much more responsibility in my office and have become a go-to person when people have questions or need help with projects. I've been asked to assist with interviewing candidates and training new hires. Not to mention the fact that before even getting my results, I was asked to run the study group for the next sitting of the exam. I became the CCLS Chair for Santa Clara County LPA and am very proud to say that everyone that studied with me in the study groups has also passed the exam. At the same time, I also became the Continuing Education Committee Chair, which is a position I never thought I'd be ready for. But we've had some very successful workshops.

To sum it all up, the CCLS exam was by far the hardest thing I've ever had to study for. I often tell people it is the hardest exam a non-attorney professional will ever have to take. It is like studying for the LSATs or the Bar exam. But passing it has made it all worth it. My confidence level has skyrocketed. The respect that I get from my employer and co-workers has been amazing. The opportunities that it has opened up for me have been incredible and I've gotten more job offers than I can count. In this day and age, knowing that you are a little more marketable goes a long way. I'm not worried about my job here right now, but I've survived several rounds of layoffs. Having the CCLS helps me to know that if something should happen and I lose my job here, I know that I can go elsewhere and have no problem finding another job. CCLS looks great on your résumé.

LS

A LEGAL SECRETARY'S PERSPECTIVE

Continued from page 31

related correspondence to clients and opposing counsel for the signature of the attorneys. While there may be many secretaries who handle these types of duties and perhaps more at their positions at large law firms, it is far more common at small and mid-size firms.

Another example of working at smaller to mid-sized office environments, is it allows me to know exactly whom it is that provides myself and my fellow employees with our paychecks. Seeing them daily, exchanging polite chit-chat and looking into the eyes of the partners who sign my payroll check every two weeks is something that gives me personal satisfaction, as I take pride in my work and can face the bosses on a daily basis with dignity. Also, the dress code in a smaller environment is typically more relaxed and informal.

Let us compare what I described in the above paragraphs with working at a large firm. As you know there are many benefits to being an employee of a firm with much prestige. One obvious benefit is a high pay rate. A high salary with generous benefits and perks is immeasurable in its value to an employee. Another is the recognition and respect in knowing that you have been accepted to work at a national or international firm. A good feature in working at larger firms is that the secretary is in a position to delegate work to numerous staff members including calendar clerks, mailroom staff, and other important legal professional staff often referred to in general, as "office services." Many large firms will also find you at a five star hotel for the holiday party, sometimes a paid trip to the parent office in another state, along with a limousine ride to the hotel. Furthermore, large firms offer days of orientation and formal training for their employees.

Do be prepared to wear your best office attire on a daily basis, except on Fridays because many large firms offer what is known as casual Friday, when you can wear a nice top, shoes and a pair of your best jeans.

Finally, when it comes to year-end reviews, a large firm typically utilizes a computer-generated survey, which is passed around to each attorney that you support resulting in an overall rating based on the input of each attorney who filled out the survey. The review process at a small firm, if any, is casual and closer to a year-end conversation or a brief hand-written appraisal for the file. In my opinion and experience, no news is good news, and you will certainly know that you are doing well if you do not hear complaints.

By working at a field or branch office, you can have the benefits of both law office worlds; the hands-on experience and personal congeniality I describe at a small to mid-sized office, as well as the monetary benefits and rewards of the large firm. This is because the field office will be typically smaller in size but the parent office is typically large in size, allowing you to have many of the perks and benefits of a large firm with the more casual and informal atmosphere of a small firm.

Of course, not all offices will be exactly the same. This article only touches on certain aspects from my standpoint. I did not mention working for a sole practitioner, which would mean two things: you and the lawyer. A two-person office is another thing entirely. Expect to be all things to all people in that type of set-up. That said, no matter where you end up (large, mid or small office), know that all experiences are learning experiences that you can take with you to the next opportunity.

LS



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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 19 and ending April 30, 2018. During the classes, the following topics will be covered:

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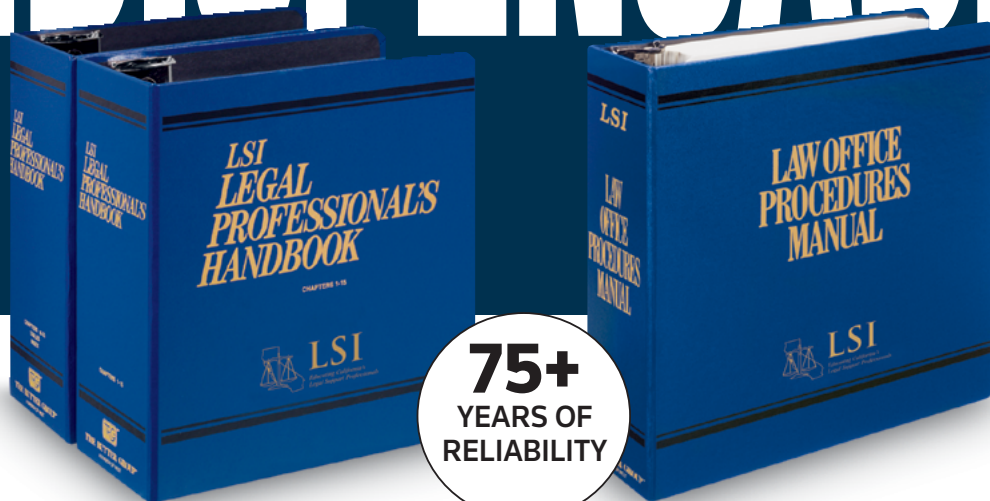
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- **NOVEMBER ISSUE (to be submitted no later than September 1st):**
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CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam.		N/C	
CCLS STUDY GUIDE Sample questions and answers to assist in preparing for all sections of the CCLS Exam.		25.00	
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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	
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