

THE Legal Secretary®

FEBRUARY 2019



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It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct. — *Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS*

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President's Message

BY HEATHER EDWARDS, LSI PRESIDENT



HEATHER EDWARDS is LSI's newly elected President and has been a member of San Fernando Valley Legal Secretaries Association since 1991, the same year she joined the legal field. She obtained her Bachelor's Degree from California State University Northridge. In May 2006, LSI President Mary S. Rocca presented Heather with the President's Award. Heather resides in Northridge, California with her husband of 27 years Ernie, and their 4 children, Kennedy, Koree, Kaden and Kamden.

THE FUTURE OF LSI

We are in a very important time for LSI. As a part of our recent Marketing Campaign, #MeetLSI was introduced and with that, we are essentially 'grooming' LSI for the next generation. Effectively grooming the next generation is imperative to LSI's future success and retention of members. We need to take the initiative to ensure our great corporation is ready for the next generation of legal professionals – Millennials, Generation Z-ers, and beyond.

From a young age, Millennials have participated in group activities, play groups, team sports, etc. They value teamwork and eagerly seek the input of many. They are part of a no-person-left-behind generation, and they are willing to fight for what is reasonable. They share a generational personality that covets teamwork, self-worth, and technology. Generation Z-ers are especially tech savvy. As our Vice President and Marketing Coordinator, Lynne Prescott, CCLS mentioned, "...we have to meet the needs of the legal professional where they are, and then we need to exceed those needs."

So how do we accomplish this? We are in the process of our upgrading the features and capabilities of our website to increase web traffic and offer additional educational training through online webinars and classes. We are in the beginning stages of creating an LSI App for mobile learning capability. In order for us to grow 'virtually', we will be discussing the possibility of forming a new Technology Committee that will encompass all aspects of LSI social media. You will be hearing more about this at our February 2019 Quarterly Conference in Alpine, California.

Do we change the name of our magazine? Do we change the name of our organization? These are questions that you will be hearing more about in the coming months for your consideration and discussion. LSI needs to meet the needs of the legal market and at the same time preserve our reputation in providing stellar California legal education and professional development for the legal professional past, present, and future.

We need your participation, your commitment, your support, and your dedication. Have you considered becoming an officer of LSI? It takes a certain level of commitment, professionalism, and desire to make a difference in this corporation. There are many changes coming in the future for LSI, and we need confident, committed, and dedicated leaders to make it happen. The future of LSI depends on its members and quality leadership of its officers and chairmen. The future of LSI needs YOU! We are T.E.A.M.



LS



THE HONORABLE CARLA BALDWIN CARRY is currently a United States Magistrate Judge for the Federal District of Nevada in Reno, Nevada. Prior to her elevation to the bench, she served as an Assistant United States Attorney in the criminal division of the United States Attorney's Office for the District of Nevada for 8 years. During her tenure as an Assistant United States Attorney, Judge Carry specialized in prosecuting crimes against children, complex white collar fraud, and public corruption. Judge Carry served as the District of Nevada's Coordinator for the Project Safe Childhood initiative, the Northern Nevada Financial Crimes Task Force, and as the District of Nevada's Elections Coordinator.

Prior to becoming a federal prosecutor, Judge Carry was an associate attorney with the law firm of McDonald Carano Wilson LLP for five years where her practice focused primarily in the areas of appellate, commercial, civil, and privacy related litigation. In addition, Judge Carry served as a judicial law clerk to the Honorable Procter R. Hug, Jr. on the Ninth Circuit Court of Appeals and the Honorable Peter I. Breen on the Second Judicial District Court for Washoe County, Nevada. Judge Carry has a Bachelor of Arts Degree in Speech Communications with a minor in Business Administration from the University of Nevada, Reno and has a juris doctorate degree, with great distinction, from the University of the Pacific, McGeorge School of Law.

"Fall Into Winter" Inspirational Brunch Message

BY HONORABLE CARLA BALDWIN CARRY – SUBMITTED BY SANTA CLARA COUNTY LPA

When I was asked to speak here today, I was asked to provide inspirational words and to try to weave in the theme to the conference - "Fall into Winter."

To be honest I was a bit stumped. I set about researching - because that is what I do - what would be appropriate? Like any Type A lawyer, I decided I should start researching. So, I looked at the dictionary definition for the terms "Fall and Winter". Naturally these are seasons. However, if you look at the dictionary - they have other meanings.

For example -

Definition of "Fall"

- lose status or position; downward slope

Definition of "Winter"

- last or final period of life; period of decline.

I, however, do not define these seasons in this way. In fact, I have a different definition of these terms based on my own experiences. First, I look at Fall as a season of gratitude. It is a time to be thankful for what we have - no matter how great or small. And Winter I define as a time when we can give back. It is a time to give back to those that may have helped us during that year - over our lives.

My perspective is often different from those in my professional. Both as an attorney and now as a judge. I know that I don't look at things the same that others do based on a unique and varied experience. So, today, I would like to impart - maybe a bit of inspiration about how an attitude of gratitude toward life - coupled with high expectations - led me to that unique prospective.



So let me start with a story.

In fall 1972 - specifically Thanksgiving Day - a baby was born in California. Her parents were teenagers. Mom only 19 and Dad only 18. They had no money, no education, and certainly the expectations were already quite low for how this young couple and their new baby would survive. Children raising children is not ideal under the best of circumstances.

However, if that were not enough, the young child's father was already well on his way to becoming an alcoholic and a drug addict. His part-time job in fact was to sell

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drugs on the side – unfortunately it was not a lucrative proposition because he used more than he sold.

The life that this baby was born into was chaotic and difficult to say the least. They young family lived in poverty, there was a great deal of dysfunction. If this were not enough, the young girl suffered through a series of very traumatic experiences. When she was only 4 years old she was bit by a dog that left her right ear permanently deformed and would later become the subject of constant ridicule and bullying.

At 5, her baby brother was born with a severe congenital heart defect. With her father, often drunk or incapacitated while her mother was a work, caring for this very sick little boy often fell on the little girl's shoulders.

Her brother ultimately died when he was 18 months old. After his death, the family fell even deeper into dysfunction and chaos and her parents ultimately divorced about a year later. So, by the time she was only 8 years old, she had survived a life filled with very traumatic and difficult events.

Looking at her life on paper, the general consensus would have been that this child simply had no chance at success or achievement.

There was good reason to believe that because we do know from various studies that given all that she had experienced, her future did not look bright. For example, we know that:

Child born to teenage parents = 50% less likely to attain higher education, they are far more likely to do poor on standardized tests, to become addicts, to live in poverty and to end up in the criminal justice system – not as judges but as defendants.

Children who live in poverty or come from lower socio-economic classes are statistically far less likely to break out of the cycle of poverty or obtain higher education.

Children who experience childhood traumas – like the death of a sibling, family dysfunction, and divorce – statistically will suffer from a variety of issues in adulthood – including behavioral and emotional issues none of which generally lead to professional and personal success.

Finally, children who come from families with addiction on only one side are 50% more likely to develop addiction themselves. However, when a child comes from a family with addiction on both sides, 2 in 5 of those children will likely become addicts themselves – which also usually leads to their being involved in the criminal justice system.

Statistically this child should have ended up either an addict, a criminal or both. But as I am sure you have already surmised – that little girl was me. I lived through all of that and quite a bit more growing up.

But that is the problem with statistics – and worse expectations set based upon what studies and these types of things tell us.

What these statistics do not take into account is that human beings are not predictable and they often do things no one expects. These studies also don't account for how the love of a family – if even dysfunctional and a bit crazy -- can make all the difference.

For me, I did not end up on the wrong side of the statistics I just described – not really because of me. In fact, I do not stand here before you today “in spite of” my childhood – I stand here today as a newly appointed federal judge – because of that childhood.

First, my family loved me – and in spite of the dysfunction and chaos – I knew that they supported me and believed in me – long before I believed in myself.

Most critically – I also had my mother.

I knew growing up – no matter how bad things were or how crazy things got – my mom was there. She gave me stability in the middle of the storm and she put me first like no other. When there wasn't enough food – she made sure I ate first. When there wasn't enough money, she made sure I just didn't know.

She made it clear to me that I could do or be anything I wanted – if I put my mind to it. But what made my mom not just a good mom – but a great mom is that she made it very clear to me that she EXPECTED me to be successful. She expected me to work hard, to go to college, and to do great things. There were no excuses or reasons why that would not be. There would be no pity parties for my childhood. She expected me to succeed.

Knowing that the expectations were high – made it so it never occurred to me that I could not achieve or do the things that I wanted. This was in the face of knowing there was no money for me to go to college or really any obvious support.

Those high expectations fueled me – and forced me to think high and to think big – and I believe it made all the difference.

The second thing that helped me not to become one of those statistics was that I was always grateful and

always kept my perspective on what was positive from my experiences. This is something I really did not realize that I did until my father spoke at the judicial investiture in October and pointed it out.

Frankly, I am not sure where that came from – except also from my family and my experiences. I suppose it is from learning at only 6 years old – life is precious. It can end in an instance.

So, rather than be bitter that I worked fulltime to put myself through undergrad – when all my friends had their parents paying their tuition or their bills – I focused on how much more I was learning than all my friends.

My dad, who has now been sober for over 30 years, pointed out in his remarks. After he found recovery, he and I were actually both going to Chico State at the same time. During that time, we would sometimes meet for lunch.

He stated that he was always so impressed when he and I would talk while I was at college, he would sometimes apologize for not being able to help me financially. However, I always told him not to worry about that because I was grateful for my experiences. I was learning life skills that my friends – who didn't have to learn how to juggle a fulltime job, school, and a sorority – would never get. I ultimately graduated – although it took me twice as long as my friends – without any undergraduate debt.

During that time, I got married, bought my first house, and got a great job right out of school. And then I was blessed with becoming a mother.

Ultimately, I went to law school. But like everything else – I didn't do it the easy way. When I started law school, my daughter was 18 months old, I was still working full time and I was commuting from Grass Valley to Sacramento every day. Several days a week, I left at 6 am and got home around midnight. My daughter's bedtime stories were often cases that I needed to read for class.

But through all of it, I was so grateful and so amazed I was even in law school. I knew that if I could do it, I would be able to give my daughter the life I didn't have. I would be able to give her an example of what hard work and dedication that many don't ever see or appreciate.

Gratitude not only helped me appreciate what I had – but helped me to achieve it because it kept my mind focused on the positive – instead of all the hardships. I will not lie, I have had many bad days. I have had my fair share of pity parties and wallowed in my misery from time to time. But in those moments, if I can just find one thing I am grateful for, it seems to change my entire attitude about what is happening at a given moment.

You have seen my bio – which tells you much of the rest of my story, but I want to emphasize, I didn't get here alone. It started with high expectations and was followed by a deep sense of gratitude.

So, I urge you, set your expectations high – not just for yourself but for those you love and those around you. I truly believe that people will rise to the expectations set for them – but those around them and by themselves. When someone is not expected to achieve – or to achieve little – that is what they will do. But when the expectations are set high – they will rise to the occasion. In setting expectations high, you aren't just telling them you expect them to achieve – but you are also sending the unspoken message – that you believe in them and you believe they can do it. For many people, knowing someone believes in them can make all the difference. I am proof of that.

Second, I urge you to be grateful. There is always something in your life – no matter how bad it may seem – no matter how horrible that partner is that you work with or the stress of working in this field may seem – there is always something that you can look at in your life and be happy for.

I was a baby born on the ultimate day to give thanks. So, I hope in hearing these words you will also see this season of Fall as a time to be thankful. And you will allow yourself to fall into the next season – Winter – a time when you can hopefully give back to all of those people and things you were grateful for.

Thank you again for having me here today – I am truly grateful for this opportunity.

LS

BOLD SIMPLE MEMORABLE



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LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM

CCLS Mini-Mock Exam

Legal Terminology, Legal Computations, Ability to Communicate Effectively

Third Quarterly Conference, February 15-17, 2019

Viejas Hotel and Resort, Alpine, California

Saturday, February 16, 2019, 7:30-8:30 a.m.

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

Some sections of the CCLS exam are more troublesome for examinees than others. For this mock exam, we are taking three of those sections and administering a 50-minute mini-mock exam that delves a little more deeply into Legal Terminology, Legal Computations, and the Ability to Communicate Effectively. 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 12, 2019

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@dsnw.com. CCLS

CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



LEGAL SPECIALIZATION SECTIONS

February 16, 2019

Deadline to register without late fee: February 11

Section Member - Free | All others - \$15

Legal Specialization Sections Seminars

VIEJAS HOTEL AND RESORT, ALPINE, CA

11:00AM - 12:00PM

Civil Litigation

"Bull" Jury and Trial Consulting:

The How's and Why's of Jury Consulting

Leticia Ostler and Jeremy Ostler

Law Office Administration

Defense of Wage and Hour Claims

Lisa Hird Chung, Esq.

3:00PM - 4:00PM

Criminal and Family Law

Domestic Violence

Family Law & Criminal Aspects

Stefano L. Molea, Esq. and Elizabeth Molea, Esq.

Probate and Estate Planning

Administering Trusts in Life and at Death

Nicole Paschoal, Esq.

4:30PM - 5:30PM

Federal Law

Calendaring, Filing Motions, Trial Readiness

Joe Diaz, CM/ECF Coordinator

USDC Southern District of California

Specialty Law

Tribal Law

REGISTER ONLINE AT WWW.LSI.ORG

The Legal Specialization Sections are a program of Legal Secretaries, Inc., an approve provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.0 hours each, by the State Bar of California unless otherwise specified.



LEANNA PIERCE has been a member of San Diego LSA for over 10 years, and has served as President, as well as Governor, and is currently serving as San Diego LSA's Vice President/Programs Chair. She also served as LSI's Professional Liaison/Day in Court Chair. Leanna is employed by Morris Law Firm, APC, and has been employed in the legal field for close to 20 years.



RENEE EVANS, CCLS, has been a member of San Diego LSA for over 25 years, and served as their president in 1995–96 and again in 2016–17. She currently serves as San Diego LSA's Education Chair and LSI's Webinar Section Leader. After working at Luce Forward/McKenna Long/Dentons for almost 23 years, Renee recently decided to begin a new chapter as an intellectual property litigation secretary at Pillsbury Winthrop Shaw Pittman LLP.

Viva Las Vegas - Education, Celebrities, Entertainment, and Lots of Fun!

BY: LEANNA PIERCE AND RENEE EVANS, CCLS – SUBMITTED BY SAN DIEGO LSA

San Diego Legal Secretaries Association invites you to have a blast at LSI's Third Quarterly Conference at Viejas Casino & Resort in Alpine, California, February 15–17, 2019.

The weekend kicks off with a free (with conference registration) seminar on Admiralty and Maritime Law coordinated by our own J. Cori Mandy, CCLS. After the seminar, the festivities continue at 6:30 p.m. with a "Meet & Greet Our Sponsors and Vendors" event, which will be held in conjunction with our Friday night Reception. Come by and mingle with our wonderful sponsors and vendors, visit the photo booth, get some free goodies, and every 15 minutes you will have a chance to win a prize. You must be present to win! Be sure to come dressed to impress—prizes will also be awarded for the best "Old School Vegas" attire.

On Saturday the education begins at 7:30 a.m., with a CCLS workshop—our very own Terrie Quinton, CCLS, will be administering mini mock exams on Legal Terminology, Legal Computations, and Ability to Communicate Effectively. If you are studying for or thinking of studying for the CCLS exam, Terrie's seminars and classes are excellent.

The Board of Governors' meeting starts promptly 9:00 a.m., followed by a coffee break. There are two LSS seminars at 11:00 a.m. and then the luncheons begin at noon. The second session of the Board of Governors' meeting begins at 1:45 p.m., and immediately following the meeting we will have our second "Meet & Greet Our Sponsors and Vendors" event. This is another opportunity to talk to our wonderful sponsors and vendors, get some free goodies, and again every 15 minutes you will have a chance to win a prize. You must be present to win! The day continues with four more



LSS seminars and then on to the big event—Saturday night banquet. There will be lots of famous people, including...well, that's a surprise, but we promise you will laugh, sing, dance, and it will be AWESOME! This is definitely an event that you do not want to miss. The weekend will wrap-up with a Sunday-Funday brunch.

Viejas Casino and Resort has eight dining venues, including the Grove Steakhouse and a Buffet. It features world-class gaming, an elegant bingo room, and an off-track betting facility. There is a lush, spacious pool and lounge area with decorous fire bowls and swaying palms. For deep relaxation, simply step into the whirling hot tub.

If you would like to transport yourself to a world of relaxation and beauty, book a service at Willows Full Service Day Spa. Willows Spa offers a variety of facilities including a salt water spa pool, a spa garden, a salt sauna, a steam room, two hair stations, two pedicure stations, two manicure stations, a 24-hour fitness center and two outdoor spa cabanas where treatments can be provided.

The cost to stay at Viejas Casino and Resort is \$149 for a single/double, \$169 for a triple, or \$189 for a quadruple. There is complimentary self-parking, valet parking, and WiFi in guest and meeting rooms.

PLEASE NOTE: Viejas will not allow ice chests on the premises.

The beautiful Viejas Outlets are located across the street and features dozens of America's most popular names in apparel, accessories, footwear, housewares, and so much more! There are numerous eateries, Viejas Bowl, and during the winter season, Southern California's largest outdoor ice rink.

WANNA SAVE SOME MONEY?
(Yes, even though it's a casino, you CAN save money)

Sign up for a MyViejas Club card (which is FREE to join and FREE to be a member) and you can SAVE MONEY. With a MyViejas Club card you get 20% off of dining, daily specials on beverages, 5% off at the V Store & Gift Shop and at Willows Spa & Salon.

If you were considering extending your stay there are hundreds of other things to do in San Diego County. San Diego is home to the World-Famous San Diego Zoo, SeaWorld, Balboa Park, the USS Midway Museum and LegoLand, just to mention a few. You could also go on a harbor cruise, visit our historic Gaslamp Quarter or Old Town San Diego, see a play, go for a trip to Julian (for some amazing pie), or take a quick dip in the Pacific Ocean.

Getting to Viejas is easy! The San Diego International Airport is approximately 39 miles from Viejas. There is no hotel shuttle service however, Super Shuttle <http://www.supershuttle.com/default.aspx?GC=CT8WB>. A shared ride shuttle offers a 5% discount one way; a 10% discount round trip. You can make your reservation online or call 1-800-Blue-Van and use the code: CT8WB. Rental car services are also available at the airport.

If you have any questions or need additional information, please contact Leanna Pierce (619.248.0970 / lpierce@morrislawfirmapc.com) or Renee Evans, CCLS (619.823.7332 / renee.evans915@yahoo.com).

LS

Dates to Remember in 2019

February 21, 2019	Deadline to register for LSS Webinar – Bankruptcy! A 60,000 Foot View
February 28, 2019	LSS Webinar – Bankruptcy! A 60,000 Foot View 12:00 p.m. – 1:00 p.m.
February 11, 2019	Registration deadline for Legal Specialization Sections Seminars at LSI 3rd Quarterly Conference
February 12, 2019	Registration deadline for CCLS Workshop (CCLS Mini Mock Exam) at LSI 3rd Quarterly Conference
February 15-17, 2019	LSI 3rd Quarterly Conference Viejas Casino & Resort, Alpine, CA Hosted by San Diego LSA
March 1, 2019	Last day to submit articles for May 2019 issue of The Legal Secretary



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The Continuing Education Council

PROUDLY PRESENTS



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PROCOPIO CORY HARGREAVES & SAVITCH, LLP

SOME UNUSUAL JURISDICTIONAL AND PROCEDURAL ASPECTS OF ADMIRALTY AND MARITIME LAW

FRIDAY, FEBRUARY 15, 2019

5:15 p.m. to 6:15 p.m.

Viejas Casino & Resort

Email reservations to: J. Cori Mandy, CCLS
jcmandy5@gmail.com
619-515-3256 or 619-954-3603

*Seminar is free with a paid conference registration

Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1.0 hour.



SCOTT HOGATE is a Southern California native raised in Orange County, a graduate of Chapman University and later earned an MBA from Redlands University. He has been married for 23 years to Kate with three lovely children...Kevin, Brian, and Megan. He is a financial professional with work experience at various companies in Orange and Los Angeles counties including roles as Assistant Treasurer and Corporate Treasurer for some major corporations. Currently, he has been employed by PNC Bank for 4+ years as a Treasury Solutions Advisor. Because of recent events in his family's life, he is now generating awareness to parents for their young adult children.

Practical Parenting Lessons Learned From the Death of a Child - Especially for Single or College Bound Children over Eighteen

BY SCOTT HOGATE – SUBMITTED BY ORANGE COUNTY LSA

We have children with the goal of providing for them and guiding them down a path of happiness and success. It's our expectation that our children outlive us, but sometimes things happen out of order. One can never fully prepare, but one could be more prepared.

We – Scott and Kate Hogate – unexpectedly lost our son, Kevin, while he was at college at the age of 20. We share our tragedy, and difficult lessons learned, should tragedy strike when you have an adult child. We hope nobody reading this experiences a tragedy like ours, but we encourage you to consider taking simple steps to act clearly and confidently if an emergency with your adult child occurs. We have learned many have incomplete checklists and could benefit from our experience. You will encounter many college preparedness guides and checklists, but we've yet to find one that prepares you for an emergency health crisis with your adult child.

Do you know how to reach your child's friends, roommates, significant other? Can you access their phone in an emergency? Are you aware of your parental rights? Are you aware of your child's rights as a young adult? Are you familiar with privacy laws that could prevent you from accessing basic information about your young adult? Do you know their feelings about quality of life, organ donation, and last wishes? Will the people around your child be trained and have access to an automated external defibrillator (AED) in an emergency?

Consider having these conversations with your loved ones, especially with those 18+, even if it feels uncomfortable. Dedicating a small amount of time now – while your head's clear – can help you act with clarity and confidence should you ever be in the position to make difficult decisions during a devastating situation.



A Rude Awakening

Friday, April 6, 3:15AM, we received a call from an unidentified number in Savannah, Georgia. Kevin was attending college in Georgia, and we assumed it was a general announcement from the school related to weather, so we let it go.

Another call came one minute later. This time it was a more defined number; instinctively, I knew this was important. My heart pounded when I answered and the voice on the other end asked, "Is this Kevin's mom?" The emergency room doctor continued, "We have your son in ICU."

My mind raced, struggling to make sense of that statement. The doctor informed us that Kevin was brought to the hospital in full cardiac arrest. His condition was serious, and we should get to the hospital right away. How was this possible? Kevin didn't have any heart issues, didn't do drugs, drink, or smoke.

Coincidentally, we were on the East Coast and drove nearly 400 miles in the early hours of the morning arriving around 8:00AM. Soon after our arrival, Kevin experienced a second cardiac arrest. They revived him within fifteen minutes. We soon learned with the first event that roommates, EMS, and

doctors worked on Kevin for forty minutes. They initially pronounced him dead, but within seconds, Kevin came back on his own...a belief of ours that he wasn't ready yet.

His heart was exhausted, lungs a mess, and they worked on stabilizing his heart to evaluate organ functionality. There was also the question of his neurological state. With all the trauma and time Kevin experienced without oxygen and blood flow, there was serious question as to his brain activity. Doctors explained that to evaluate Kevin's overall condition including his brain, they needed to stabilize him for 72 hours.

Around 5:30PM, Kevin experienced a third cardiac arrest. Again, staff was able to restart his heart, but now doctors were unsure whether he would survive the evening. Doctors huddled to discuss options we might have to save Kevin. They recommended an Impella device, heart pump, to give Kevin the best chance of survival. Surgery was risky, but to provide any opportunity of reaching that 72-hour stabilization mark, our only option was surgery. It was possible that Kevin wouldn't even survive the transport to the operating room let alone the surgery. Acting quickly, we consented and proceeded with surgery.

The operation was successful, gifting us the opportunity to pass the 72-hour mark and assess his neurological state. On Monday morning, neurological testing was conducted, sadly, results confirmed what we prayed would not be true, no brain activity. After a long discussion with doctors and knowing we were comfortable having met Kevin's wishes for a quality of life, we decided to discontinue life-support. Leveraging our Catholic faith, we arranged for his Last Rites and spent our final hours with Kevin along with his brother, sister, other family and friends. Kevin passed away quickly and peacefully that evening.

In the end, the doctors' diagnosis was an unexplained complex heart arrhythmia or sudden cardiac arrest (SCA) leading to sudden cardiac death (SCD).

What is Sudden Cardiac Arrest and Sudden Cardiac Death?

We've heard about young athletes collapsing and dying while playing sports, but imagine our shock when we heard our fun-loving, easy-going twenty-year-old Eagle Scout had suffered a major cardiac event with no previous indications of anything. We were left searching for a cause and what we found was eye-opening. We discovered something as simple as stress, cold medication and video gaming could've contributed to Kevin's death. These by themselves shouldn't have resulted in SCA, but likely these in combination with other factors triggered Kevin's SCA.

According to Cleveland Clinic, "...sudden cardiac arrest (SCA) occurs when the electrical system to the heart malfunctions and suddenly becomes very irregular. The heart beats dangerously

fast. The ventricles may flutter or quiver..., and blood is not delivered to the body... SCA is not a heart attack... Heart attacks occur when there is a blockage in one or more of the coronary arteries... Sudden cardiac death (SCD) is a sudden, unexpected death caused by loss of heart function. SCD is the largest cause of natural death in the United States..." (<https://my.clevelandclinic.org/health/diseases/17522-sudden-cardiac-death-sudden-cardiac-arrest/resources-patient-info>).

According to the Mayo Clinic, some causes include: "...smoking, drinking too much alcohol or caffeine, drug abuse, stress, certain medications and supplements, including over-the-counter cold and allergy drugs and nutritional supplements, diabetes, sleep apnea, and genetics." Prevention includes, "...eating a heart-healthy diet, increasing your physical activity, reducing stress, as intense stress and anger can cause heart rhythm problems..." (<https://www.mayoclinic.org/diseases-conditions/heart-arrhythmia/symptoms-causes/syc-20350668>).

Share Emergency Contact Information

We wanted to piece together the events that lead to Kevin's condition by speaking with his roommate and friends. We realized we didn't have Kevin's roommate's number. The school dean was soon to arrive, and we retrieved Kevin's phone. We hit another roadblock with a numeric code preventing access. At the same time, we watched texts come in from Kevin's friends inquiring "what's up?", "why aren't you replying?", and "hey buddy, where are you?"

Privacy laws prevented the college from sharing updates with us, Kevin's roommate, and other college friends. Nor could the college provide us with their contact information.

We realized Kevin's phone was part of our phone plan, and accessed his activity online. We saw incoming and outgoing calls and messages, found numbers associated with the activity, but no names. With this, we cold called numbers, introduced ourselves and quickly built out his social circles.

In discussion with the dean, he mentioned that during new student orientation the school recommends roommates sharing each other's parents' contact information, or other emergency contact information. We did this in Kevin's first year, but not his second. We suggested the following as additional solutions that could help in the event of an emergency:

- Track family members user ID's, passwords, etc. on a spreadsheet or app (iPhone's LastPass) (Place in sealed envelope. Update quarterly!)
- Display emergency contact information in dorms and apartments
- Provide our story and these suggestions annually via college orientation, high school graduation preparation, school-wide emails, websites, blogs, etc.

CONTINUED ON PAGE 14

Share Phone Access Within Family

We initially tried to guess Kevin's password. However, the screen displayed, "1 attempt has failed, 9 attempts remain" and "after 10 attempts, all information will be cleared". We wanted access to obtain pictures, videos, and a special list his friends mentioned would be of interest; his "to do" list when he came home during summer.

We contacted our service provider, informed them of the situation, proved that we were the account holder, and that Kevin was our dependent on our plan. The provider stated they could only reset the phone which meant losing all content. We inquired whether there was a unique "master reset" code for situations like ours that could be used if we verified relationship and ownership. Their reply was a scripted, "No."

We then reached out to the phone manufacturer. Their response was also, "No." Growing more disappointed and frustrated, we asked, "Do you think that, if your CEO was in the same position, your Technology Department wouldn't be able to unlock his or her child's phone?" Their reply was, "Nope."

Is there a "Master Code" for qualifying situations? If not, why not? If the manufacturer, carrier, and customer could validate relationship, ownership, and unique serial number to a specific device, why couldn't a one-time unique master code could be provided?

Recommended Legal Documents for Adult Children

How much power do you have as parents over your young adult child's medical well-being? For most, the answer is none. Regulations put into place by The Health Insurance Portability and Accountability Act (HIPAA) were designed to protect patient privacy and can be a barrier to your immediate needs for information when it comes to your child's health and well-being.

As much as you love and want to care for them, you can't without their written permission. You will learn this lesson at parent orientation. Colleges repeatedly inform you that though you may be paying, you're not permitted to see grades, collegiate financial status or personal or medical information.

Kevin was incapacitated and in serious condition. Nobody could speak for him, but us. One of the first things the hospital asked was if Kevin was married. We confirmed he wasn't, but there wasn't much more to confirm other than our medical insurance card stating he was our dependent. We answered all questions providing whatever information we could. While we did not run into too many barriers with the hospital, we still felt there was information withheld.

After Kevin's passing, we reached out to our attorney and friend. He had just heard about Kevin and mentioned he had

created a 'College Plan' for his children consisting of:

- **Will** – Verifies child's assets will go in accordance with the child's wishes.
- **Durable Power of Attorney** – Allows designee to sign for the person who is incapacitated and unable to sign.
- **Advance Healthcare Directive and HIPAA Privacy Waiver** – Allows designee to make medical decisions and obtain medical information if one becomes incapacitated.

Learning this, our other children will get the 'College Plan' when they're 18. Todd Litman's (www.toddlitman.com) College Plan is available for \$300, which includes a \$50 donation to the *Kevin Hogate Graphic Design Memorial Endowed Scholarship* (assisting students at Kevin's college with similar interests) when you mention this story or Kevin Hogate. These documents are specific to California, attorneys in your state can prepare similar documents.

Spouse & Dependent Life Insurance

Preparing for the future can be a long, burdensome, and expensive process. Parents typically don't prepare for a child's funeral. We were fortunate to have elected spouse and dependent life insurance through an employer. Typically it's a few dollars per pay period. For us, the death benefit took about six weeks to receive. Funeral services, cemetery plots, and additional transportation (Kevin from Georgia to California) may result in costs more than two or three times a typical death benefit. We recommend enrolling in both parent's employer's life insurance options, if available.

Automated External Defibrillators (AED) – A Developing Trend

If an AED had been in Kevin's dormitory, and used within the first few minutes, his chances of surviving would've greatly increased. Studies indicate that use of an AED will improve chances of survival by 90%, with every additional minute of delay reducing that possibility by 10% (Wilkoff, 2018).

Because of the affordability of AEDs, numerous institutions, businesses, airports, schools and places of worship have them in place with trained personnel. Many have experienced positive results in saving lives. Let's raise awareness so it's standard practice for all buildings and sports facilities to have AEDs. Do you have influence in this decision process?

Good Samaritan laws are at the State level and exist in most if not all states. Individuals providing life-saving procedures are legally protected from liability. Good Samaritan laws offer legal protection to people who give reasonable assistance to those who are, or who they believe to be, injured, ill, in peril, or otherwise incapacitated. Under the Good Samaritan laws which grant immunity, if the Good

PARENTING LESSONS LEARNED...

Samaritan makes an error while rendering emergency medical care, he or she, in general, cannot be held legally liable for damages in court.

Preventive Heart Testing for Children and Young Adults

As children reach their early teens and prepare for high school, many are required to have a physical to participate in high school activities. Physicals are typically very basic. Preventive heart testing among youth is not commonplace with traditional physicals. The cost for testing is minimal and sometimes is offered by schools.

Organ Donor Discussion

Do you know your child's preference? Have they made a designation? Have you had a discussion with your child about "afterwards"? Kevin wasn't a designated donor. By happenstance, we had recent conversations with Kevin following his grandfathers' deaths. He wanted a quality of life or no life and he wanted to be intact. It was a surreal conversation with his mom, knowing Kevin was such a giving person and what his organs could mean to someone. The conversation wasn't carried further with the thought it would be revisited on a later date.

When Your Child Moves Out or Goes to College

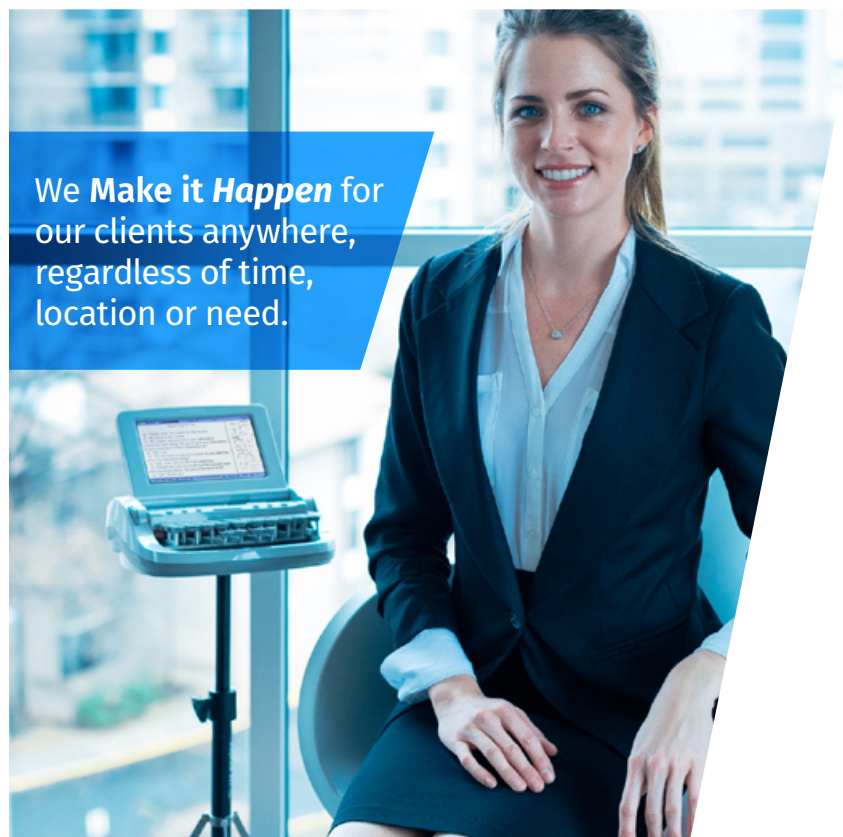
As your child is preparing for college or moving out on their own, what should you do or say? How can you start these important conversations? Share our story, and consider this checklist:

- Develop a family password program
- Complete "College Plan" documents
- Take a picture of their Durable Power of Attorney, Advanced Healthcare Directive, and HIPAA Privacy Waiver documents and store on a mobile phone or cloud storage (Save folder as "ICE" - In Case of Emergency)
- Share your child's general and emergency contact info with their roommate and roommate's guardians
- Obtain your child's roommates' general and emergency contact info
- Locate the nearest AED

Lead the Way

Start a conversation now, don't put it off thinking you don't need to do it today. It's like any insurance, you don't think you need it until you really need it. A few simple steps will better prepare yourself and your adult child. Peace of mind is priceless!

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NOVEMBER, 2018 | RENO, NV

2nd Quarterly Conference







GWENDOLYN EDWARDS FIRST became a member of the Beverly Hills Century City Legal Secretaries Association in the 1980's. She has served as Legal Procedures Chair, Website Chair, and Editor for the Legal Daze newsletter and currently serves as President. With over 20 years of what she likes to call, "hard core litigation experience," she has worked as a legal secretary in the areas of complex business litigation, bankruptcy, probate, and entertainment law and has been an office administrator. In 2019 she will earn her paralegal certificate from the ABA-approved paralegal program at West Los Angeles College, where she currently serves on the Paralegal Advisory Committee. She hopes to become a student of Loyola Law School after she earns her

paralegal certificate. Gwen is currently employed as a litigation secretary with the law offices of Glaser Weil Fink Howard Avchen & Shapiro in Century City.

November 2018 Quarterly Conference Inspirational Message

BY GWENDOLYN EDWARDS, CCLS,
PRESIDENT OF BEVERLY HILLS CENTURY CITY LSA

Inspiration comes from the Latin inspiratus
– "TO BREATHE INTO," "TO INSPIRE".

As with any assignment, when President Heather Edwards asked me to give the inspirational message, I immediately started to think – what will I say? What would be an inspiring message? Where would I find words that would really speak to my LSI family?



So, as I always do, I began to research wonderful sayings of famous people. I gathered a lot of information – another thing I always do. Then, to focus my direction, I decided to read the task assigned in President Heather's email once more. As I read it, I put my head in my hands and could feel a slight, extra thump in my chest. You know ... we know – legal secretaries they are a hard room – smart, quick to analyze, quicker to critique and criticize – sometimes in a positive way – sometimes in a not so positive way. How could I possibly inspire this group? As my head left my hands, my eyes were on the very first page of my research that defined inspiration – TO BREATHE INTO!

Robin Sharma said, "Leadership is not about a title or a designation. It's about impact, influence and inspiration. Impact involves getting results. Influence is about spreading the passion you have for your work, and you have to inspire teammates and customers." Suddenly, I knew all that research was not what I needed. As I tossed it away, I realized all I needed to do was look within – within LSI for every bit of inspiration any of us could possibly need.

Pope Paul VI said, "Never reach out your hand unless you're willing to extend an arm." I don't know how many of our LSI Past Presidents, or if our current President has ever read that quote, but most definitely they have all embodied it—and, thus, this vital corporation has been maintained. Each new LSI President, as a result, takes on the inherent task of

maintaining, expanding, and assuring that LSI is relevant to its members and the demands of the legal fields in which they serve. They have done this by inspiring its members.

Within LSI where have you found that inspiration:

From the works of every LSI Past President since Louise B. Cord in 1934-36 and her Executive Committee members;

Was your inspiration in the dedication to LSI Past President, Joan M. Moore, PLS, CCLS, and the quote we all know so well regarding the duty of each member of LSI;

From the PRC who year-after-year shoulders the responsibility of making sure the information in the Legal Professional's Handbook and Law Office Procedures Manual is up-to-date and the most helpful reference source for legal professionals;

Is your inspiration the constant efforts of the Legal Specialization Sections who provide newsletters containing the most up-to-date information for their sections and who constantly find exceptional speakers for each LSI conference;

Is it the Continuing Education Council and the magnificent work done by its members, who through inception to now have not only made the CEC a formidable division of LSI, but in the process have made themselves LSI legends: J. Cori Mandy, CCLS, Karen Jones, Terrie Quinton, CCLS, Donna Day, Becky Neidhardt, CCLS, Dawn Forgeur, CCLS. I

can't remember when those names have not been connected with these jobs – TALK ABOUT INSPIRATION!

Or maybe your inspiration came from two people who made me believe I could study and achieve the designation of CCLS – Laurelyn Bergfeld, CCLS and Mae Chester, CCLS, who year-after-year showed up, whether there was a handful or a roomful of people in the audience and taught them how to pass the CCLS exam. Counting the number of people who they taught, who now call themselves CCLS – THAT'S INSPIRATION!

The past LSI Presidents who took the eight year journey to get that position, the support and the unseen obstacles they found upon arrival are a testament to their perseverance and commitment. Each LSI Past President, each person who accepted a chair or committee position on their behalf, and stayed the course, is proof that the winners are those who run the distance. They ran that race for each person who has ever

called themselves a member of LSI. I challenge you to take a trip through the LSI Calendar and Roster. I guarantee you'll find endless examples that have and will continue to inspire you in that little white book.

I have always found President Edwards' courage, commitment and enthusiasm for LSI to be contagious. All along her eight year journey, I have waited for the day she became President, to serve her in any way possible to realize her dreams for LSI. Let's all stand strong, believe in ourselves, and fulfill the dreams and goals with our 46th LSI President, Heather Edwards. Let's commit with her, without reservation, to work tirelessly and do our best to champion the cause of LSI, to steward with her, the mission of LSI and to strengthen and secure its future, as ONE TEAM, ACTING TOGETHER, EMPOWERED BY EACH OTHER ACCOMPLISHING MUCH MORE THAN WE COULD EVER DO AS ONE.

LS

CCLS QUIZ: LEGAL COMPUTATIONS - CALENDARING

DIRECTIONS: USING THE CALENDAR PROVIDED, DETERMINE THE LAST DAY FOR EACH ACTION BELOW.

JANUARY						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FEBRUARY						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

MARCH						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

1. Your trial date is March 26. What is the last day to personally serve interrogatories?
2. Your demurrer is being heard on February 2. What is the last day to mail serve your motion?
3. A complaint for unlawful detainer was personally served on January 11. What is the last day to respond?
4. Great Aunt Betsy died on January 26. You found out on January 31. What is the last day to file the original will?
5. Your Case Management Conference is scheduled for March 6. What is the last day to file your Case Management Statement?
6. A special meeting of shareholders has been set for March 13. What is the first day to provide notice?
7. Your motion for summary judgment in an unlawful detainer matter is scheduled for March 23. What is the last day to personally serve the motion?
8. Your client was personally served with a petition for dissolution on February 1. What is the last day to file a response?
9. Plaintiff's complaint was served on defendant on February 5. What is the first day defendant may serve written discovery?
10. Plaintiff's incomplete responses to written discovery were mail served on January 12. What is the last day to file a motion to compel further responses?

CCLS QUIZ ANSWERS ON PAGE 29

ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION

Presents

EDUCATION THROUGH THE YEARS



May 15-19, 2019

DoubleTree by Hilton, 39900 Balentine Drive, Newark, CA 94560
Legal Secretaries, Incorporated - 85th Annual Conference

HOTEL REGISTRATION FORM

ACCOMMODATIONS: (Plus applicable taxes and fees)

Single/Double	\$159.00 per night
Triple	\$169.00 per night
Quadruple	\$179.00 per night

Check in is 4 p.m. Check out is 12 p.m.

RESERVATIONS: 510-490-8390 GROUP CODE: ACL
<http://group.doubletree.com/85thAnnualLSIConference>

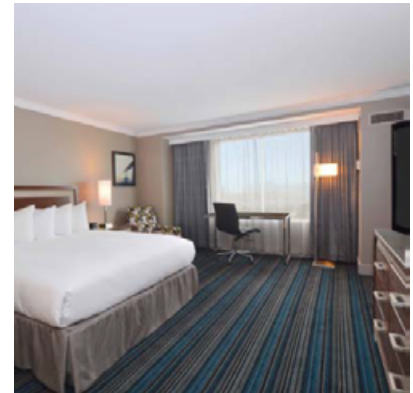
Deadline to reserve your room is April 24, 2019
No Room Rate Guarantee After This Date

Parking: Complimentary Self-Parking

Airport: San Jose International Airport is 13 miles (30 minute drive)
Oakland International Airport is 21 miles (20 minute drive)
San Francisco International is 36 miles (45 minute drive)

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Enjoy shopping at NewPark Mall, located within walking distance of our hotel. Wine connoisseurs can visit the Livermore Wine Country, just 12 miles away, to discover and learn about a variety of famous Californian wines. Experience the excitement and attractions of downtown or watch the San Francisco Giants play, just a half-hour drive from DoubleTree by Hilton Newark-Fremont. Head over to Oakland and go to the Oakland Alameda Coliseum and ORACLE Arena and watch the A's and Golden State Warriors. Take the family for an exhilarating day out to California's Great America Theme Park or visit the Winchester Mystery House - a Victorian mansion with a unique history - just 15 minutes away.

ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION

Presents

EDUCATION THROUGH THE YEARS



May 15-19, 2019
DoubleTree by Hilton
39900 Balentine Drive Newark, CA 94560
Legal Secretaries, Incorporated
85th Annual Conference



CONFERENCE REGISTRATION FORM

NAME (As it will appear on badge): _____
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CITY/STATE/ZIP: _____
HOME TELEPHONE: _____ WORK TELEPHONE: _____
EMAIL ADDRESS: _____
LOCAL ASSOCIATION (do not abbreviate): _____ ☐LSA ☐LPA
PLEASE CHECK IF APPLICABLE (include title):
STATE OFFICER: _____ STATE CHAIRMAN: _____
☐ GOVERNOR ☐ CCLS ☐ PLS

SCRIP TICKET (Includes Registration, Welcome Reception, Banquet and Brunch):

POSTMARKED ON OR BEFORE APRIL 15, 2019	_____ @	\$137.00	\$ _____
POSTMARKED ON OR AFTER APRIL 16, 2019	_____ @	\$147.00	\$ _____

INDIVIDUAL TICKETS:

Registration On Or Before April 15, 2019	_____ @	\$25.00	\$ _____
Registration On Or After April 16, 2019	_____ @	\$35.00	\$ _____
Welcome Reception (Friday)	_____ @	\$25.00	\$ _____
*Governors Luncheon (Friday)	_____ @	\$33.00	\$ _____
*Presidents Luncheon (Friday)	_____ @	\$33.00	\$ _____
*Open-Newcomers Luncheon (Friday)	_____ @	\$33.00	\$ _____
*Kalman S. Zemplyny II CCLS Luncheon (Saturday)	_____ @	\$33.00	\$ _____
* <input type="checkbox"/> Roast Beef on a Steak Sandwich Roll <input type="checkbox"/> Chicken on a Baguette <input type="checkbox"/> Vegetarian Wrap and * <input type="checkbox"/> Soup or <input type="checkbox"/> Salad			
Banquet (Saturday):	_____ @	\$63.00	\$ _____
<input type="checkbox"/> Beef <input type="checkbox"/> Chicken <input type="checkbox"/> Vegetarian			
Brunch (Sunday)	_____ @	\$30.00	\$ _____
TOTAL AMOUNT			\$ _____

Special Dietary Request (Including vegetarian): _____

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Teaming Up - Adopting New Approaches for Today's Legal Secretary

BY MARY KATE SHERIDAN – SUBMITTED BY SAN DIEGO LSA

The role of the legal secretary has changed dramatically in recent years. As attorneys have become more self-sufficient and client demands for efficiency have increased firms have adopted alternative secretarial models.

“Legal secretaries remain a very important part of the client-support process,” says Petrice Ryan, Director of Business Operations at Paul Hastings LLP. “The role has evolved as attorney needs — and frankly attorney technology skills — have evolved. A successful legal secretary must demonstrate the ability to adapt, be flexible, continuously meet the demands of practice-specific and technology knowledge and skills and the ability to navigate firm culture.”

With the changing needs of the modern lawyer, law firms should consider the best ways to optimize their support professionals. This article will discuss some reasons behind the evolving legal secretary role, potential alternative approaches, and advice for successfully implementing a new model.

FACTORS BEHIND THE EVOLVING LEGAL SECRETARY ROLE

Among the areas that have influenced the role of the legal secretary are technology, a changing workforce, and cost savings.

Technology

Without a doubt, technology has been the biggest influence on the reshaping of the legal secretary role.

“It has completely changed the dynamic,” says Jennifer Hill, President at JHill’s Staffing Services, a division of Marcum Search. “It started in 2007 with the invention of the smartphone or the iPhone. ... Up until that point you didn’t have round-the-clock availability. ... All of a sudden, everyone was accessible at the touch of the button. Then skills began to shift.”

With an array of technological tools at their fingertips and proficiency to boot, the new generation of lawyers is far more self-sufficient and willing to handle tasks that previously would have been delegated to a secretary.



“The role has changed so dramatically over the past, at least, four to five years with the onset of all of the technology that’s being introduced,” says Gera Vaz, Consultant at SB2 Consultants LLC. “You have really tech-savvy associates coming into the workforce, and what we’re finding is a lot of the work legal secretaries are doing now is really more administrative in nature.”

Talent Pool

Another reason for the changing legal secretary role is the pool of available secretaries has diminished.

“Finding qualified people for these jobs can be difficult,” says Ryan. “For whatever reason, these particular jobs are not viewed in the way they used to be. In truth, these are great, challenging jobs that pay well, but finding the right people for these jobs is challenging.”

Cost Savings

With clients being even more conscious of billable hours, the need to create systems that promote greater efficiency and cost effectiveness has permeated the legal world.

“There was certainly an effort 10 years ago to do a reduction in force as a cost-saving measure,” says Joe Buser, Vice President of Strategic Accounts at Traveling Coaches.

And given that attorneys are no longer using legal secretaries in the same ways, their time may be better maximized through an alternative model that provides a steady work flow of appropriate assignments.

“The old economics just don’t work anymore,” says J. Mark Santiago, Partner at SB2 Consultants LLC. “You can’t have a secretary sitting there to waste 10 to 20 to 30 percent of time doing things that are better done by others. Clients won’t allow it; the economic squeeze on law firms continues, and it doesn’t serve the firm either.”

MODERN APPROACHES TO THE LEGAL SECRETARY ROLE

Due to the above factors, the traditional one-to-one legal secretary model is no longer ideal. Below are some alternative approaches.

Team Model

In modifying the legal secretary role, many firms have embraced a team model through which a group of legal secretaries supports a number of attorneys.

Paul Hastings has found success with its teaming model, which is staffed with what the firm calls “Client Service Specialists” or “CSS.” While partners at the firm are still assigned to a specific CSS, associates and paralegals are supported by the entire CSS team. According to Ryan, attorneys can request assistance via email, via telephone, or in person, and any available CSS on the team can take the assignment.

“We’re just looking for the easiest and best way to get the work done and support the attorneys and clients the best way we can,” says Ryan.

Critical to the success of this model is having the CSS team sit together to encourage team communication.

“Much of teaming is dependent on the teams being together so they can communicate effectively,” says Ryan. “Collaboration is key. So we try to sit our CSS teams together so they can continuously communicate with each other and collaborate on projects and assignments. Direct communication to one another and with the attorneys is key to the team’s success.”

Additionally, resource team leads provide oversight to the CSS teams. Responsibilities include assisting with resource allocation, work flow coordination, managing coverage, and coordinating time off among the team members.

Another firm that has executed a successful secretarial team model is Irell & Manella LLP. The firm tackled the new approach by starting with its most junior attorneys.

“On the attorney side, we found that the absolute best thing to do was take a strategic and not a tactical view of this and make the change with our youngest attorneys,” says Robert Cramer, a Consultant and former Director of Human Resources at Irell. “They’re digitally proficient in most cases.

They’ve never had a secretary before. You take those folks when they walk through the door, and [as] they graduate up, that’s the model they’ve known and understood.”

The firm has found that the desire to use the centers has occurred organically, but Irell partners who prefer working with a designated secretary still can.

“It’s transitional and something all firms have to work through,” says Cramer.

Differentiated Teams

One variation to the team model is to staff each team with secretaries of differing specialties or experience levels.

For example, firms may establish secretarial service with legal secretaries of varying levels of expertise, including entry-level assistants who will focus on more administrative tasks and experienced legal secretaries who can focus on more intensive tasks like e-filing, says Vaz.

Indeed, a more specialized assignment system for legal secretaries can enhance efficiency.

“Anywhere from 20 to 40 percent of legal-secretary time is spent on things that you don’t need their experience and training to do,” says Santiago. “If you can pull that out, you enable the senior legal secretaries — who are highly skilled people — to do that highly skilled work.”

Hybrid Models

While the team method may work for most attorneys, it isn’t necessarily the best model for all, especially senior partners who heavily rely on a secretary. Some firms use a hybrid approach that institutes a team secretarial model, while allowing direct secretary assignments for the most senior attorneys who heavily rely on them.

“There are some partners who can keep an individual secretary busy, and it’s integral to their practice,” says Santiago. “The program needs to be flexible enough to recognize that but also move the firm towards this new model.”

TIPS FOR SUCCESSFULLY MANAGING THE CHANGING LEGAL SECRETARY ROLE

Before a firm moves forward with a new secretarial model, it must create a plan.

“Consistency and communication: those are probably the two things that would be my advice for anyone looking at change management and entering this new frontier in the legal industry,” says Hill.

Planning the new model, considering the firm’s specific needs, obtaining buy-in, being transparent, and providing support to the secretaries are critical to a firm’s success.

Continued from page 23

Have a Plan

A plan offers secretaries and attorneys a roadmap of what they can expect.

“People are very different,” says Buser. “They have different skills. Just putting them together and calling them a team doesn’t mean it’s going to work. There needs to be a lot of preparation. And you have to prepare the lawyers to accept a new model.” Buser recommends crafting communication that excites lawyers about the new approach and promotes the idea of gaining a team rather than losing a personal secretary.

Be Attuned to Your Culture

Critical in developing such a plan is focusing on your firm’s needs.

“I think the downfall comes from the lack of really defining what the firm’s goal is, based upon the area of law that they’re in,” says Cynthia Thomas, Founder and President of PLMC & Associates. “It’s not a one solution fits all.”

Indeed, focusing on your firm’s culture and goals can be helpful in crafting the secretarial solution that will work best for your attorneys and how they work.

“Each firm has a different culture, so they have to think about their own culture and what it is they want to accomplish,” says Ryan. “What’s the goal with teaming? What are you trying to do? What problem are you trying to solve? Are you trying to do more with less? Are you trying to improve the substance of the support you give to attorneys?”

Get Buy-In

Garnering buy-in is important to having a successful new secretarial model.

“You absolutely must have a key partner jump into these centers,” says Vaz. “Everyone goes along with it until it’s their secretary. So there needs to be leadership buy-in.”

Part of getting this buy-in is to fully understand the needs of the attorneys and the skills of the secretaries. By communicating how the teams will satisfy both parties, the firm can obtain greater support.

“Our experience is that firms don’t go about it in a systematic way, and they just put these groups together and say ‘now go out and do it,’” says Santiago. “They haven’t talked to the stakeholders to see what they need, and they haven’t talked to the secretaries.”

And firms shouldn’t make the mistake of focusing solely on the partners and associates; they must focus on the secretaries themselves, who will be the face of this change.

“It’s really crucial to get the buy-in from the legal secretaries,” says Thomas. “I think before any implementation of change, it should be discussed within a meeting or open-type forum to make this a team effort and make their voices heard.”

Be Transparent

Another tool that is essential for a successful roll out of a new secretary model is transparency.

“Any time you’re dealing with change management, transparency is key,” says Hill. “Otherwise you’re going to set people up for failure.”

Firms should endeavor to be open and frank with legal secretaries about their new roles. Many secretaries have devoted their entire careers to the firm, and they’re nervous about the cultural change, says Cramer.

Provide Training and Coaching

The unfortunate aspect of new models is that they may not work for all people, and some secretaries may find that their skills or preferences do not align with a team approach. In these cases, firms may need to innovate and consider additional training, especially in the area of utilizing technology, says Vaz.

Secretaries who are resistant to change can consider whether they’d prefer to transfer to another job or consider a separation package. An effective approach is to provide a coach who can help secretaries consider whether retirement is a better option and what that means financially, emotionally and socially for them, says Vaz.

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LS

LEGAL SPECIALIZATION SECTIONS

2018-2019 Membership Form

MAY 1, 2018 - APRIL 30, 2019

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

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LSS Coordinator

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Meet the LSS - *Legal Specialization Sections*

The Legal Specialization Sections is one of LSI's standing committees. The LSS team works together to present continuing legal education seminars at every LSI conference, a monthly webinar, and a quarterly newsletter for each Section. These seminars and webinars offer California MCLE and California Certified Legal Secretary credits.

There is a planning meeting at every LSI Conference with all LSS Leaders to finalize any outstanding needs for the seminars at that Conference and to work on future seminar topics and speakers along with the newsletters and flyers for upcoming conferences and webinars.

The LSS Coordinator is an appointed officer of LSI and is a member of the Continuing Education Council and the Marketing Committee.



Legal Specialization Coordinator – Dawn R. Forgeur, CCLS

Dawn has been a member of Sacramento LSA for over 15 years. She is a past President and Governor for SLSA, and is currently the editor of the monthly bulletin and website/social media chair. She has worked for her current firm, Stoel Rives LLP, for seven years as a litigation secretary, but has been in the legal field for about 20 years.

She started in the legal field as a file clerk and office services for a solo practitioner and the paralegal at that firm began her training as a legal secretary. She was introduced to SLSA and LSI by Astrid Furstner, CCLS who showed her a crazy, wonderful world of like-minded people! Fun Fact: She met her husband online on a local BBS (bulletin board system), before the world wide web existed! She also loves going to concerts, movies, and comedy shows.



Criminal and Family Law Leader - Mary Lou Floyd, CCLS

Mary Lou has been a paralegal for over 25 years, with a BA in Criminal Justice and an MS in Psychology. She has been a member of LSI since 1988, when she joined Mt. Diablo LPA. As a member of Mt. Diablo LPA, she has been a past President, has held various board and chair positions, and is currently the Parliamentarian.

Mary Lou has worked in many areas of the law, including family law, estate planning, litigation, trial support, bankruptcy, criminal, real estate, and business law. She currently works at Aharoni Business Law, where she is the Client Services Director, paralegal, intake paralegal, and office manager. Fun fact: Mary Lou is fluent in Spanish, including reading and writing Spanish. She is also a Notary Public.



Federal Law Leader – Bettina Jacobson

Bettina is the first Federal Law Section Leader for the LSS! She is also a member of Placer County LPA and is currently its Vice President and Social Media Chair. She was its Governor for five years and currently VP and

Social Media Chair. She currently works for Nevada County Superior Court in the civil division. She has worked there for 6 years. How did she get into the legal field? She was fired after working for over 5 years for a friend (some friend) and took a skilled aptitude test at a local job center that indicated she should be in the legal field. She went back to school at MTI (technical college) and got her paralegal degree in 2012. She had a hard time even finding a job as a receptionist. She saw an ad for the courts and applied and got hired. She did an internship at a law firm and met a past member of PCLPA who introduced her to that association. Fun Facts: 1) She climbed the third highest peak in CA twice – White Mountain (14,252 feet). 2) She has ridden her bike 5 years in a row, 330 miles over 4 days, to raise funds for NorCal Aids Challenge.



**LEGAL
SPECIALIZATION
SECTIONS**



Probate and Estate Planning Leader – Carmen J. Vasques

Carmen has been in the legal field for over 26 years. She has worked for Stephens & Stephens, LLP for 18 years as the legal secretary, office manager, file clerk, everything.

She started in the legal field when she answered an ad for a bilingual translator for an insurance defense firm. She has been an active member of LSS since 1995 when she first joined with Santa Barbara LSA. In 2000 she transferred her membership to the Santa Maria LPA. She is a past President and Secretary for Santa Maria LPA. Fun Fact: She is a league bowler and travels for state and national bowling tournaments.



Webinar Leader – Renee Evans, CCLS

Renee is the first Webinar Leader for the LSS! She is in charge of finding speakers and setting up monthly webinars, which are free for members of any Legal Specialization Section. She has never held any

prior LSI committee chair. Renee has been a member of San Diego LSA for over 25 years, and served as their president in 1995–96 and again in 2016–17. She currently serves as SDLSA's Education Chair

Renee started in the legal field as a receptionist studying to be a legal secretary at a solo attorney law firm. The attorney at that firm trained her to be a legal secretary. She is currently a civil litigation secretary with Pillsbury Winthrop Shaw Pittman LLP in downtown San Diego. Fun fact: She has bungee jumped and is done!



Specialty Law Leader – Cyndee Saucedo

Cyndee has worked for Myers Nave for 14 years and is the land use and environmental practice group manager. She is the Governor and 2019 Annual Conference Chair for Alameda County LSA and has been a

member for over five years. She was previously a member of San Mateo LPA.

She started her legal career at a solo law firm as a legal secretary with no experience. That law firm put her in touch with Tanya Tate and Cynthia Woodman for legal training, which worked! Fun Fact: Cyndee was ranked No. 5 in women's wrestling in the United States and qualified for World Team Trials in 1996.

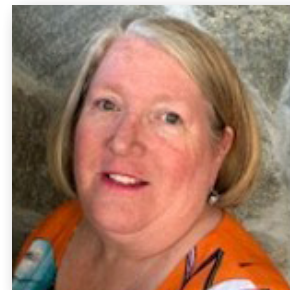


Law Office Administration Leader – Annette M. Davis

Annette has been a member of San Fernando Valley LSA for over 20 years (and was a member of Antelope Valley LSA before joining SFVLSA). She is currently SFVLSA's Treasurer,

but has also been President several times. She is employed by Wilson Elser Moskowitz Edelman & Dicker LLP, and has been with them for seven years.

Annette got her start in the legal field as an Executive Administrative Assistant for General Counsel at a bank. She started taking on work from the Litigation Department and decided that she really needed to know what she was doing and took a Legal Procedures course at the local community college where she was introduced to LSI by the instructor, Lori Young, who was part of Antelope Valley LSA. Fun Fact: Annette is a tennis fanatic! She is currently on a local USTA Women's Doubles team, and recently won 2nd place in a Women's Singles community park tennis club tournament – her 1st trophy ever!



Civil Leader - Belinda Owens

Belinda has been a member of San Diego LSA since 1998 and has held numerous chair positions, including President, Vice President, and Governor. From 2010–2012, she was the LSS Transactional Section

Leader.

Belinda started her legal career as a receptionist in 1997 and was promoted to a legal secretary position with no training. She took classes at a city college and met Marge Burgland who introduced her to SDLSA. Belinda currently works for Schor Vogelzang LLP but is enrolled at Miramar Community College working towards an AA degree in paralegal studies with only two classes remaining. Fun Fact: Belinda served in the Marines for nine years. While in the Marines, she qualified as a sharp shooter with an M16 (while her son only qualified as a Marksman).



MICHELLE RODGERS, CCLS is a paralegal with Aronowitz Skidmore Lyon in Auburn, California. She has been in the legal secretary for 30 years, earning her CCLS in 2001. Michelle is a current member of Placer County LPA and has been a member of LSI since 1992.

A Reflection of My 30 Year Career

BY MICHELLE RODGERS, CCLS – SUBMITTED BY PLACER COUNTY LPA

March will mark my 30th year working in the legal field. As I have been preparing to transition into early retirement, I thought I would write and reflect on my career and my involvement in Legal Secretaries Incorporated (“LSI”).

Oh, the stories I could tell about special clients, unusual cases, frustrations with the judicial system, exciting victories, and the many friends and acquaintances I’ve made along the way. I will, however, focus this article on my career and how my involvement with LSI played a key role in my success.

I was an extremely shy child and still consider myself to be rather reserved. However, I have grown considerably over the years with the guidance of many colleagues.

In early 1989 I saw an ad for an entry level legal secretary job. My mother had passed away six months prior, but I remembered her always telling me that I should become a legal secretary. So I sent in my resume. I had strong secretarial skills — I just needed to learn the legal aspects. A wonderful attorney hired me and was willing to teach me what I needed to know. I was nervous and excited about this new challenge, but also proud and knew that my mother would have been proud to see that her daughter was now a legal secretary.

Shortly after I started working as a legal secretary, I found a Beginning Legal Secretary training course offered by a local LSI association. That training course was an excellent start for me. Within a few years I began attending Contra Costa County Legal Secretaries Association (“CCCLSA”) meetings and became a member of CCCLSA and LSI. In no time, I had a position on the CCCLSA Board and I was guided through the process by the good people in my Association.

The knowledge I gained by attending educational membership meetings with CCCLSA and workshops offered by the Bay Area Legal Secretaries Forum (“BALSF” now Bay Area Legal Forum “BALF”) and LSI helped me tremendously. It wasn’t long before my boss and others around me would come to me for answers to procedural questions rather than

me asking them.

When my second son was born I decided to stay at home with him for a while and I did a bit of freelance work from home. A few years later when I was ready to reenter the work force, I would have been welcomed back to work with the first lawyer I worked with, but I decided to expand my horizons and try my hand in a new field of law. Because of my involvement in my local Association, I was introduced to a real estate attorney who had her office near my home. Had I not been involved in LSI, I’m sure I would have missed that opportunity because it was a “word of mouth” only opportunity and I was known in our legal community.

I continued to attend workshops and courses offered by LSI and various local associations. I highly recommend these kinds of training courses to anyone in the field. You now only learn, but you have an opportunity to network which can prove to be invaluable.

When I was a stay-at-home mom, I attempted to study for the California Certified Legal Secretary (“CCLS”) exam, but it was too much and I decided to put that goal on hold. A few years later three other ladies and I started a CCLS study group. The three of us that took the exam in 2001 and all of us passed.

In 2002, the LSI President called and asked if I would serve as the Transactional Law Legal Specialization Section Leader. I had to take time to think about this. This was not just for my little local association; it was for our state organization. I decided to step out of my comfort zone and challenge myself, so I said “yes.” What a wonderful experience that was. I so enjoyed the members of the Legal Specialization Sections (“LSS”) team and was proud of the work that we did. Education is really what LSI is all about



A REFLECTION OF MY 30 YEAR CAREER

and that is what I was helping LSI to provide to its members and anyone else who wanted to attend the LSS workshops.

Because of the knowledge I gained through my work experience, attending educational meetings, seminars, and workshops, and my own willingness to seek out answers, I was handling more than your average legal secretary. So at the end of 2003 the attorney I was working with certified me as a Paralegal.

In 2004, my husband and I decided to move our family to the Sierra Foothills in Northern California. I needed to find a job outside of my local association's area. Since I had regularly attended LSI conferences and because of my involvement with our state organization, people in the Sacramento area knew me and I was able to network once again to find employment.

Capitol City Legal Professionals Association ("CCLPA") welcomed me as a member with open arms. Then in 2005 I was appointed by the LSI President as an Assistant Editor to LSI's Publications Revisions Committee. Let me tell you, the PRC ladies (or the "red pen chicks") work very hard. I didn't feel my proofreading skills were top notch, but I was willing to push myself and take the extra time to improve those skills. Because of the research I was doing for the PRC, checking codes, updating forms, and because of all the proofreading I was required to do, I became a better legal assistant and my bosses could see the improvement. If I didn't know the answer to a question off the top of my head, I knew where to look for the answer.

I learned so much over the years by being involved with LSI. By sharing my knowledge with others, I reinforce my own skills. Networking with others helped me learn new or better ways of doing things. I loved the fact that I could send an e-mail out to a group of colleagues with a question and someone would get back to me pronto with an answer and sometimes even an example of exactly what I was looking for.

I enjoy being a legal secretary/paralegal. This career can be interesting and challenging. Each case is different, as are the clients I interact with. I won't say there was never a dull day, but something new is always just around the corner, whether it is a client, a case, or changes to rules and procedures. This job keeps us on our toes and I like that.

My involvement with local associations and our state organization has helped me to grow as a legal assistant and also as a person. I am not as shy and reserved as I once was. I know that I would not have had the career I've had if I hadn't been involved in LSI. I have made connections with legal service providers that I would not have known about and I have made many good friends throughout the state because I stepped out of my comfort zone and got involved. My husband has supported my involvement and he has seen what it has done for me on a personal and a professional level. I also believe that I have set an example for my children that getting involved in an organization (professional or otherwise) can be very rewarding.

So, if you are on the fence about joining a local association or giving up some of your personal time to get more involved in your local association or LSI, please remember my story and consider stepping out of your comfort zone and challenging yourself. You will find that it can be a truly valuable experience.

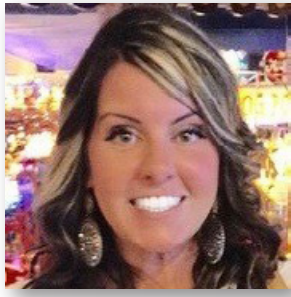
In some aspects it seems like I've been doing this job for years, but in other aspects, the time has truly flown by so fast. My husband and I are now going to take a leap into early retirement and spend much of our time in Baja near my parents. We will see how it goes. You may get an e-mail from me that I am looking for a little bit of freelance work that I can do from our place in Baja J. Otherwise, I will certainly be following you all and LSI via social media.

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From quiz on page 19

CCLS QUIZ ANSWER KEY

- | | |
|----------------|---------------|
| 1. January 26 | 6. January 12 |
| 2. January 5 | 7. March 16 |
| 3. January 16 | 8. March 5 |
| 4. March 2 | 9. February 5 |
| 5. February 20 | 10. March 2 |



JESSICA PATTON is a legal secretary with the law firm of Spinelli Donald & Nott in Sacramento. Jessica will be celebrating six years in the industry in 2018. When Jessica is not in the office she enjoys playing tennis, photography and spending time with friends and family.

My Experience at LSI's November 2017 Quarterly Conference

BY JESSICA PATTON - SUBMITTED BY SACRAMENTO LSA

I am fairly new to the legal field as I started as receptionist in 2012 for the Spinelli Donald and Nott law firm. After starting with the firm, shortly thereafter I was registered and completed Sacramento Legal Secretaries Association's Basic Legal Secretary ("BLS") course, which gave me my first glimpse of the legal world. Five years ago, the words ROE's, statutes and torts seemed like a foreign language to me, but after taking the course, I was quickly promoted to an assistant within my firm. After two years of working for associates in the civil litigation field, today I am the assistant to the managing partner and a senior associate. I owe much of my success to the basic skills I learned in the BLS course. Since the BLS course, I have been a member of the Sacramento Legal Secretaries Association ("SLSA") now for 5 years and have attended dinner meetings and participated in the organization's State and Federal Day in Court events as a co-chair.

This year I was lucky enough to have the opportunity to attend the LSI Quarterly Conference as SLSA's scrip winner! The Placer County Legal Secretaries Association ("PCLSA") hosted the Conference at the Lions Gate Hotel and Conference Center on Veteran's Day weekend with a range of festivities, seminars and workshops. There was a feeling of nostalgia to have the pleasure of being on the McClellan Air Force Base on Veteran's Day weekend.

The event kicked off with a CEC seminar where we played Legal Jeopardy and our team won! Our team was awarded \$10 Starbucks gift cards. After winning jeopardy, I was able to meet a few new vendors and pick up some swag from companies throughout California. After, PCLSA hosted the welcome reception with delicious finger foods and cocktails.

Saturday morning I attended my first Board of Governors Meeting at the Conference Center with Governor, Jan Ainsworth, who was a first-class mentor over the weekend. Following the Board of Governors Meeting, I attended a Legal Specialization Section Workshop with speaker, Mary-Beth Moyan of McGeorge School of Law regarding citations, cite checking, the California Styles Manual and the Blue Book. The fun really started that evening at the banquet in the

ballroom of the hotel. Everyone was dressed to impress and a USO-style show starring the Fred Morgan Big Band was the entertainment for the evening. The conference wrapped up Sunday morning with a wonderful brunch where author and attorney, Erin Lyon pitched her first book, "I Love You* Subject to the Following Terms". Erin Lyon adds tidbits of the funny stories that every law professional can relate with to her journalism. After the conference, I ordered the book and could not put it down!

This conference was truly an inspiration to me. It was inspiring to see women and men in this profession that are truly dedicated and take passion in their careers. I am now motivated to take the CCLS exam next October and continue to further my education with SLSA. I would highly encourage both entry level and well-seasoned legal professionals to attend a conference of their own, you will not be disappointed!

A special thank you to SLSA for including me in the event and to Governor, Jan Ainsworth for mentoring me in the duration of the conference.

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FRANCIE SKAGGS has served as the San Francisco Legal Professional Association Secretary, Treasurer, Historian and she is the current Education Chair. Francie has worked in the legal field for 20 years and she is currently working at San Francisco based law firm, Coblenz Patch Duffy & Bass.

Cracking the Code: Three Simple Steps To Break Through the Legalese of the California Rules of Court and Local Rules When Filing with the Court

BY FRANCIE SKAGGS – SUBMITTED BY SAN FRANCISCO LPA

How do we, the legal paraprofessionals, build a consistent, reliable bridge between the attorney and the clerk, while delivering our pleadings through the Court's gatekeepers?

Whether we are legal secretaries, paralegals or legal assistants, we need to ensure that our pleadings are successfully filed without being rejected by the clerk. When filing, we need to comply with both the California Rules of the Court as well as the local rules of each court. Many of us didn't go to law school, so how do we understand the legalese when reading these rules? Even attorneys with decades of legal practice experience may encounter obstacles when their best attempts at compliance with the California and local rules do not satisfy the clerk.

Here are three simple steps that can help overcome those obstacles:

- Locate the Applicable Rules
- Understand those Rules
- Clarify Any Remaining Ambiguity with the Clerk

1. Locating the Rules

Since the diminutive, spiral-bound desk books we once received annually have now become obsolete, the best modern day reference is to go straight to the source – the California Rules of Court website at <http://www.courts.ca.gov/rules.htm/>. Each county's local rules can be found at <http://www.courts.ca.gov/find-my-court.htm>, where you find not only the links, locations, contacts, but also the proper District for the Court of Appeal for each county.

2. Comprehending the Rules

Foundationally, we must understand the relationship between the Local Rules of the Court and the California Rules of the Court (hereinafter "CRC"). The CRC are rules that govern all the state Courts in California – that is, they apply statewide. They are administered, managed and updated by the Judicial Council of California (the "Judicial Council"), which is a body of highly qualified people employed by the State of California and under the leadership of the Chief Justice of the California Supreme Court, the highest court in our state judicial system. Local Rules cannot supersede the CRC. CRC Rule 3.20.

However, at times, the CRC often gives the "green light" to the Local Rules, providing there is no conflict with higher authority. For example, to open a case, CRC Rule 2.220(a) requires, "The first paper filed in an action or proceeding must be accompanied by a case cover sheet" and that cover sheet "must be on a form prescribed by the Judicial Council and must be filed in addition to any cover sheet required by local court rule." Subsequently, when filing a first paper in the Los Angeles Superior Court, it has within its Local Rules, LR 2.3(a)(1)(E), which, instructs us that a Civil Case Cover Sheet Addendum is required for all new civil case filings in "addition to the Civil Case Cover Sheet required by the California Rules of the Court." This Civil Case Cover Sheet Addendum is a locally approved form (LACIV109), which can be found on that court's website. Therefore, to successfully file a first paper and

open a new case in the Los Angeles Superior Court, this Civil Case Cover Sheet Addendum must also be filed in addition to documents by the CRC, the Complaint and Case Cover Sheet. If this local rule is not followed, your filing may be rejected or sent back asking for that form in order to open your case.

The second most basic rule is to learn to have patience in understanding the grueling legalese in so many of our rules. One way of breaking through the Court's language as swiftly as possible is to take time in advance.

Here are two ways to get started. Let's consider how the following two rules work: CRC Rule 1.5 and CRC Rule 1.6.

1. CRC Rule 1.5, "Construction of Rules and Standards" sets forth a series of requirements that require special attention. In this section, you should notice the mandatory words such as "must," which are required, as compared to words such as "should," which are simply strong suggestions. This will help you look out for and locate the words that flag a rule that unquestionably needs to be followed, versus words that may make your life easier if you follow them, but are not mandated
2. Second, take a careful look at the definitions set forth in CRC Rule 1.6, "Definitions and Use of Terms." The context of these rules is not the same in the everyday English we speak. For example, in CRC Rule 1.6 (14), the word "Person" is not just a "natural person" but this word also includes a "corporation." Who would have ever thought that a corporation would be considered a person when speaking everyday English? It is important to recognize when a term is specifically defined for the Court, and demands certain rules are followed as a result, and when a term is free to be used on Friday night (such as 'party').

3. Contacting the Court Clerk

For many of us, the all-important interaction with the Clerk may be the most challenging task of all. As a general rule, it is always best to learn how the Clerk prefers to be contacted, by telephone or email, and then proceed from there. Some courts have designated phone hours. Other courts prefer contact by email. All of this vital information can usually be found on each individual court's website.

Our communication with the Court will likely be much smoother if we have all the information available: case number, type of hearing, date and question. Just remember to keep your eye on the ball, and that ball is getting the document successfully filed without any delay. Don't be intimidated by the comportment of the Clerk; these folks are constantly dealing with the public, and often happy to help a legal professional. Think of yourself and the Clerk working together for a successful filing and representation of your client and strive to do your job in a kind and professional manner. As your career develops, a friendly Clerk who recalls your professionalism and good cheer will almost certainly prove to be one of your most trusted professional contacts.

So, to wrap this up, remember three simple steps: first, locate the applicable rules; second, understand those rules and third, maintain professional comradery with the clerk.

You got this!

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LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

<p>*NEW BENEFIT: LEGALSHIELD/IDSHIELD Contact: Courtney Coats, Independent Associate (925) 580-6446; coats8@legalshieldassociate.com LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</p>	<p>QUESTIONS AND CONCERNS CONTACT: Lynne Prescott, CCLS, LSI Vice President LSI Marketing Committee Coordinator (916) 398-0120 slprescott7@gmail.com</p>
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LORA TEMPLETON is One Legal's senior marketing manager for California. She enjoys raising chickens, beekeeping, and organic gardening from her home in the Bay Area.

In California: eFiling is Here to Stay

BY LORA TEMPLETON – SUBMITTED BY SAN GABRIEL VALLEY LSA

2018 was a record year for eFiling in California. Courts throughout the state introduced and then mandated eFiling for a variety of case types.

Early in the year, Santa Clara mandated eFiling in General Civil and San Mateo introduced voluntary eFiling for Probate and Small Claims. Over the summer, Kern mandated Probate and Civil Unlimited, Butte mandated in Unlimited Civil and Yuba mandated in all non-Criminal case types. Courts in Stanislaus and San Francisco expanded their current eFiling resources for customers.

At year's end, Los Angeles took center stage as the latest court to introduce and then mandate eFiling in Limited Civil followed by Civil Unlimited. When the New Year arrived, eFiling became required in all Los Angeles Civil case types, including Complex.

Looking at the landscape ahead, we know that 19 superior courts in California have introduced eFiling in some or all of their non-criminal case types. That means that 39 more courts, including Sacramento, Riverside, and Ventura, could be on the way.

If you didn't introduce eFiling to your legal team's workflow last year, make a resolution to do so this year. Knowing the rules and requirements of eFiling is a valuable professional skill that will equip you to work in any California court where eFiling is required.

How electronic court filing works in California

In general, there are 4 steps to the eFiling process.

- Typically, a filer logs onto a court-approved electronic filing service provider (EFSP) where the filer enters basic information related to the case, pays any applicable fees and uploads the documents.
- The documents are then securely submitted for filing from the EFSP's portal, via the electronic filing manager (EFM) as the back-end system to the court's case management system.
- The filing is then reviewed by a court clerk and if accepted, added to the case's electronic docket.



- Accepted documents or notifications of rejected filings are returned to the filer through their EFSP.

Launching an eFiling court requires collaborative work between the court, their designated EFM and the eFiling service providers who are seeking certification to be a recommended EFSP. Some states introducing eFiling, such as Illinois, will choose to work with a single EFM provider for every court. EFSPs can then work closely with that EFM and conform their applications to statewide protocols.

In California, individual courts have chosen to work with three different EFMs as various counties have adopted eFiling. In Orange and Los Angeles counties, the courts have even chosen to work with multiple EFMs for separate case types.

One Legal customers are currently able to file in all 58 California courts through a single login that connects smoothly with the appropriate EFM or traditional filing process for court and case type chosen.

How electronic court filing works in your office

Effective eFiling workflows depend on several office essentials. Use this quick list to take an inventory of your office equipment and find out what you have that's ready or needs improvement before you can start eFiling. Closing your resource gaps will make the difference in your filing efficiency and success.

- **High-speed internet:** When you eFile, you must upload your documents to your EFSP. You'll also need to download court-returned documents and documents that have been electronically served. For these processes you'll need fast internet to avoid interminably long wait times.
- **Web browser and email address:** For the best eFiling experience use one of the "big three" web browsers — Chrome, Internet Explorer, or Firefox. Keep your browser fully up to date for optimal security and functionality.
- **Scanner:** Look for a professional office scanner that allows you to adjust the resolution. 300 dpi is minimum accepted by courts and will ensure that your scans are sufficient quality but not too large.
- **Professional PDF software:** To meet eFiling requirements in California, you may need to edit and manipulate your PDF files before submission. You will need to bookmark exhibits, redact confidential information, and render image-based PDFs text searchable. These tasks will require professional PDF software with enough licenses to cover all eFiling members of the team.
- **Laser printer(s):** If your firm hasn't yet gone paperless, you may choose to print out a large filing you've received by eService. In these scenarios, you'll want a cheap, fast, and reliable printer — choose a laser rather than a two-page a minute inkjet.

Training and Resources for your team

In 1990, One Legal transformed the "same-day" legal support industry by filing the very first facsimile-transmitted document accepted in a California court. Ever since, One Legal strives to be at the forefront of legal support technology. We pioneered eFiling in Orange County, where more than half of all civil filings are placed via our service, and we're San Diego's exclusive EFSP.

One Legal's commitment to the field of litigation support services goes beyond the products we offer and the online guides we provide. We've also developed training and customer success support team to keep legal support professionals up-to-date in the latest technology and industry changes.

Our MCLE-accredited live presentations and webinars have been offered to firms and legal professional associations throughout California. Our recorded webinar eFiling and eService in California serves as an excellent general introduction to eFiling in the state and our recent webinar series eFiling in Los Angeles Superior Court focuses on the details you'll need to know to successfully file in Los Angeles Civil. We keep our presentations up-to-date with new and developing information from the Court.

Interested in scheduling an eFiling training for your firm or an online demo of our suite of litigation support tools that is tailored to your time and needs? Contact our customer success team at training@onelegal.com for more information.

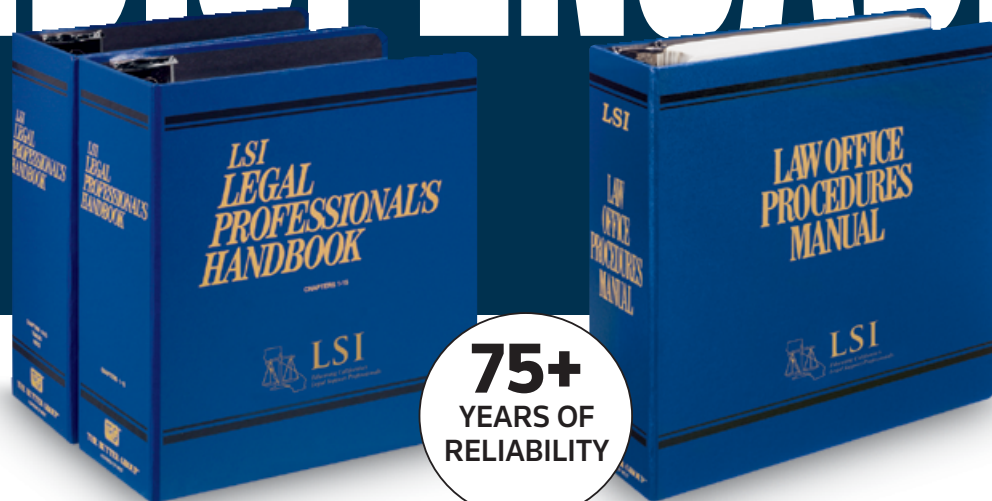
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Rev. February 2018



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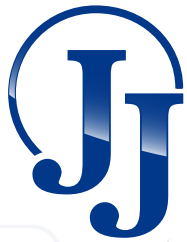


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